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## Japan

## Exporter Guide

## Japan Exporter Guide Update

**2008**

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**Report Highlights:**

Even with the recent food scares, there continues to be significant opportunities in the Japanese food market for U.S. exporters. For example, Japanese consumers are becoming more health conscious and organic, naturally prepared, and functional foods are growing in popularity. Prospective exporters are encouraged to follow regulatory changes in Japan's food safety system and stay up to date with reports from the Agricultural Affairs Office and the Agricultural Trade Offices in Japan.

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## **U.S. FOOD EXPORTER'S GUIDE TO JAPAN**

### **Building Position in One of the World's Largest Markets for Imported Consumer Food Products**

**U.S. Agricultural Trade Office, American Embassy, Tokyo  
U.S. Agricultural Trade Office, American Consulate-General, Osaka**

**2008**

## A Message from the U.S. Agricultural Trade Offices

Welcome to Japan, the world's largest market for imported consumer food products and the largest overseas market for U.S. food and agricultural exports! We look forward to working with you in this dynamic market.

To assist you, we at the U.S. Agricultural Trade Offices (ATOs) have prepared this Exporter's Guide, the emphasis of which is on high-value consumer foods and edible seafood products. Its objective is to provide clear, helpful information to U.S. companies that export, or plan to export, to Japan. This guide is organized into four sections and an appendix as follows:

- **Market Overview**  
A brief description of the huge market opportunity that Japan represents and how U.S. exporters may best fit within it.
- **Exporter Business Tips**  
Practical ideas on how to compete in this market.
- **Market Sector Structure and Trends**  
How food products move through the distribution system to the Japanese consumer today and how these channels may change in the future.
- **Best High-Value Import Prospects**  
Some of the hottest current import prospects in Japan.
- **Key Tables and Appendixes**  
Tables and charts to provide information on the Japanese food market and economy, and lists of contacts, potential customers, and other useful information.

To those exporters who are new to Japan, we believe you will find this guide invaluable as a starter kit to participation in this dynamic market. To those who are old Japan hands, we believe you may also find useful information here that you may not have previously considered.

We invite you to contact our offices in Tokyo and/or Osaka if we can assist you in building your Japanese business in any way, or if you have questions or comments on this guide.

Gambatte Kudasai!\*

U.S. Agricultural Trade Offices in Japan

\*Good luck (or literally in Japanese - "Do your best!")



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## I. Market Overview

Japan continues to represent one of the best opportunities in the world for U.S. exporters of food products. In 2007 the United States exported \$11.6 billion worth of agricultural, fish and forestry products to Japan. The total food and drink market in Japan is huge, valued at around \$555 billion. If you have a quality product that meets the needs and wants of the Japanese consumer, which can be produced and delivered competitively, and you have patience to research both the differences in consumer tastes and government regulations, you can build an attractive market position in Japan.

Japan's market for high-value foods and beverages continues to change dramatically, with the latest trend being a major thrust toward functional, healthy and nutritious foods. While traditional menus and tastes still generally guide the average Japanese consumer's consumption habits, Western and other Asian ethnic cuisines are making a major impact in the market. A wide variety of Western and Asian ethnic restaurants exist along with the growing variety of consumer ready retail products in supermarkets and convenience stores.

The Japanese consumer continues to be willing to pay higher prices for quality and convenience. However, at the same time the food industry is also recognizing that a segment of consumers also demand reasonable prices in addition to quality. Consequently, the market has responded with 100-yen produce stores and other types of discount food outlets. Major national retail chains achieve differentiation by adding value through offering the Japanese consumer products with regional identity and traceability systems associated with their meat and produce. Meanwhile, third-country competitors like Australia and New Zealand have accommodated the Japanese market's desire for additional food safety assurances by offering additional certifications and traceability systems associated with some of their meat and produce exports to Japan.

The Japanese consumer's influence is continuing to have an impact on the food market in Japan. Food retailers and food service operators are competing for consumers on a number of fronts, including price, convenience, variety and safety. The mergers and acquisitions throughout the food distribution system that have been taking place in recent years are in preparation to increase efficiency and improve the ability of Japanese food companies to compete for customers. This climate also has advantages for high value U.S. food and beverage exports that can answer to the needs of the Japanese food industry.

While it is certainly true that Japan's Ministry of Agriculture, Forestry and Fisheries (MAFF) works actively to support the interests of Japanese farmers, the requirements of the Japan food industry continue to rely on food imports in most categories. Meanwhile, overall Japanese agricultural production has declined. As one response, MAFF is increasing the allowance of food corporations to engage in contract farming in certain locations. Nevertheless, MAFF reports that Japan's self-sufficiency rate which had stood at 40% for over the past eight consecutive years, hit a new low at 39% in 2006 due to unseasonable weather which particularly hurt the sugar, rice, and mandarin crops. Farming continues to decline, with the average age of farmers continuing to increase in Japan, creating another negative impact on the self-sufficiency rate. The Japanese government hopes to increase self-sufficiency by 2015 by encouraging citizens to consume more rice and other domestically produced products, but this policy has had little success to date. Domestic agricultural production is expected to decline further in years to come.

There are many opportunities that exist for alert U.S. exporters. Just a few examples include:

- Organic and naturally prepared foods/drinks and functional foods/drinks for the increasingly health-conscious;
- Prepared precooked foods for convenience-conscious Japanese consumers;
- Products in easier-to-open containers for the rapidly growing elderly population;
- A growing market for pork;
- Food manufacturers seek quality ingredients and conveniently prepared semi-process foods that can reduce costs.

#### **Maximum Residue Level**

In May 2006 Japan implemented a new system of regulations governing chemical, feed additive and veterinary drug (hereinafter referred to as agricultural chemicals) residues in food. At that time Japan's Ministry of Health, Labor and Welfare (MHLW) announced provisional maximum residue levels (MRLs) for 758 agricultural chemicals in addition to around 10,000 existing official MRLs. Provisional MRLs would remain "provisional" until they had been reviewed and permanent MRLs established. Since that time permanent MRLs have been established for many agrochemicals with review of the remaining provisional MRLs expected to continue for several more years. These official and provisional MRLs are known as the "positive list".

Under this system, foods containing residues in excess of the established MRL levels are regarded as violations of the Food Sanitation Law and rejected at the port. MRL violations can result in the entire U.S. industry for that product being subject to very strict sanctions including costly testing and lengthy delays at the port. For those agrochemicals not included in the positive list MHLW has established a uniform limit of 0.01 ppm, as the maximum allowable limit. MHLW has established provisional MRLs on some processed foods in addition to raw commodities but for residues in processed foods without MRLs, MHLW uses the MRLs of the raw ingredients after taking into consideration things like concentration ratios.

Other information about the positive list system, including the actual MRLs, can be found on MHLW's webpage in English at: <http://www.mhlw.go.jp/english/topics/foodsafety/positivelist060228/index.html>



### Japan's Market for U.S. Beef Growing but Constrained

On July 27, 2006, Japan reopened its market for U.S. beef, six and a half months after stopping imports due to a case of non-compliance under the [Export Verification Program](#) (EV) – (See [JA 6009](#)). U.S. beef exported to Japan must be from cattle slaughtered at 20 months of age or below. The age limit creates a limited pool of cattle for the U.S. beef industry to draw from and is a constraint to exports that prevents the United States from reclaiming what was a \$1.6 billion market. Nevertheless, some progress is being made and consumer acceptance of U.S. beef is good. Several major Japanese retail chains now carry U.S. beef and sales of available supplies are brisk. From June 2007 to July 2008, Japan has imported 44,842 MT of U.S. beef and offal, valued at \$251 million. Japan's acceptance of international standards for the trade in beef is critical to reestablishing historic trade volumes in this market.

### U.S. Advantages and Challenges

The Japanese market offers many pluses to U.S. exporters, but it is not without difficulties. To put these opportunities in perspective, here are a few of the most important U.S. “Advantages” and “Challenges”:

**Table 1. Advantages and Challenges**

U.S. Advantages	U.S. Challenges
<ul style="list-style-type: none"> <li>• Strong yen versus weak dollar</li> <li>• U.S. food cost/quality competitiveness</li> <li>• U.S. product variety - from fresh, to ingredient, to processed</li> <li>• Reliable supply of U.S. agricultural products</li> <li>• Advanced U.S. food processing technology</li> <li>• Positive images of American sources - such as many of the tourist destinations</li> <li>• Relatively low U.S. shipping costs</li> <li>• Science-based and transparent U.S. food safety procedures</li> <li>• Growing Japanese emulation of U.S. cultural and food trends</li> <li>• Japanese food processing industry seeking new ingredients</li> <li>• Japanese distribution becoming increasingly like that of U.S.</li> <li>• Fewer Japanese farmers</li> <li>• Higher Japanese farming costs</li> <li>• Demand for high-quality healthy and functional foods</li> </ul>	<ul style="list-style-type: none"> <li>• Increased food safety awareness (BSE, etc.), increasing demands for food quality certifications and production information</li> <li>• Declining price competitiveness</li> <li>• Distance from Japan</li> <li>• Consumer antipathy toward biotech foods and additives</li> <li>• Japanese preoccupation with quality</li> <li>• Consumers “prefer” Japanese products (image problem with imported food in general)</li> <li>• High cost of marketing</li> <li>• Japan's policy and actions try to increase self-sufficiency</li> <li>• Labeling laws that are often difficult</li> <li>• High duties on many products</li> <li>• Differences in enforcement of port inspection regulations</li> <li>• Increasing low-cost competition from China</li> <li>• Sometimes subsidized European exports</li> <li>• Exporters are often expected to commit to special contract requirements and long-term involvement</li> </ul>

## II. Exporter Business Tips

The following are a number of thoughts, collected from a variety of sources, on exporting food products to Japan. Some are obvious, but warrant repeating; some you may never have considered. They are organized under five topics:

- Dealing with the Japanese;
- Consumer preferences, tastes, and traditions;
- Export business reminders;
- Food standards and regulations;
- Import and inspection procedures.

We hope these suggestions will prove useful in your efforts to build food exports to Japan.

### Dealing with the Japanese

Japanese business people, no matter how Western they may appear, do not always approach business relations in the same way as Americans or Europeans. Some differences are simply due to the language barrier; others are due to differences in deeply held traditions and practices. To help bridge the gaps, we suggest that you:

- Speak slowly and clearly to every Japanese, even if you know he or she speaks English.
- Use clear-cut, simple words and expressions when writing in English.
- Use e-mail and fax, rather than telephone, whenever possible.
- Make appointments as far in advance as practical.
- Carry plenty of business cards (*meishi*). Present them formally at each new introduction—and be sure they have your personal information in Japanese on the back.
- Be on time for all meetings; the Japanese are very punctual.
- Expect negotiations to require a number of meetings and probably several trips to reach agreement. Early discussions may appear less fruitful than reality.
- Be prepared for misunderstandings; use tact and patience.
- Be aware that in Japanese, “*Hai*,” (yes) may mean, “I understand,” not, “I agree.”
- Limit the discussion of business at evening meals, or when drinking with new Japanese counterparts; these occasions are for getting to know one another and building trust.
- Be aware of major Japanese holiday and business break periods, e.g., the New Year holiday (approximately January 1-7); Golden Week, a combination of national holidays (April 29 - May 5); *Obon*, an ancestor respect period lasting for about one week in mid-August during which many companies close and business people take vacations.

### Consumer Preferences, Tastes, and Traditions

These ideas may help you focus your product approach. Japanese consumers:

- Are very concerned about food safety and traceability – commonly used terms are ‘Anzen’ and ‘Anshin’ that, respectively, mean ‘safety’ and ‘peace of mind’ regarding safety;
- Place great importance on quality—producers that fail to recognize this will not succeed;
- Appreciate taste and all of its subtleties—and will pay for it;
- Are well-educated and knowledgeable about food and its many variations;
- Are highly brand-conscious—a brand with a quality image will sell;
- Care a great deal about seasonal foods and freshness—awareness and promotion of these characteristics, where appropriate, can significantly build product sales and value;
- Are increasingly health-conscious—(Witness the many TV programs about healthy food. When a product's health attributes are highlighted on such a program, it quickly sells out at the supermarkets.)
- Japan standards increasingly differ from U.S. standards; consequently, Japanese consumers will expect imports to adhere to Japanese standards, including the JAS organic standard.

Japanese consumers also:

- “Eat with their eyes” and often view food as art. A food product’s aesthetic appearance—on the shelf, in the package, and on the table—is very important in building consumer acceptance.
- Have small families and homes with minimal storage space; thus, large packages are impractical.

Again, as in the United States, there are differences in regional food practices, preferences, and tastes. To illustrate, a comparison between the Kanto and Kansai regions is in the chart below.

**Table 2. Examples of Differences in Japanese Regional Food Preferences**

<b>Tokyo (Kanto region)</b>	<b>Osaka (Kansai region)</b>
<ul style="list-style-type: none"> <li>· Somewhat less food cost-conscious</li> <li>· More salty foods</li> <li>· More spicy products</li> <li>· More Western products</li> <li>· More cuisine variety</li> <li>· Prefer pork</li> <li>· Prefer buckwheat <i>soba</i> noodles</li> </ul>	<ul style="list-style-type: none"> <li>· Very food cost-conscious</li> <li>· Less salty foods</li> <li>· Less spicy products</li> <li>· Somewhat fewer Western products</li> <li>· More traditional Japanese foods</li> <li>· Prefer beef</li> <li>· Prefer wheat <i>udon</i> noodles</li> </ul>

### Export Business Reminders

Below are some important reminders about exporting to Japan:

- Before coming to Japan, use the many sources of U.S. information, e.g., the Foreign Agricultural Service, state agricultural offices, state/regional trade organizations, and JETRO regional offices in the United States (see Appendix D).
- Build at least a minimum team within your company to help on the Japan market.
- Limit your number of trading partners, but avoid exclusive agreements with any one company.
- Use metric terms.
- Quote CIF, unless the importer requests FOB pricing.
- Price competitively; exclude U.S.-based costs, e.g., domestic sales, advertising, marketing, etc.
- Ensure that all sales documentation is correct.
- Be patient regarding requests for documentation, ingredients lists, production process, and quality assurance.
- Respond to such requests with diligence and in a timely fashion.
- Use letters of credit to reduce risk.
- Hedge export values with your U.S. bank if you are concerned about exchange rate risk.
- Set up wire transfers for payments.

### Food Standards and Regulations

U.S. exporters often find Japanese food standards difficult to deal with. Here are a few tips:

- Read the Japan Food Sanitation Law,
- <http://www.jetro.go.jp/en/reports/regulations/pdf/food-e.pdf>
- Read the USDA Japan GAIN Report, Number JA8052, "Japan: Food and Agricultural Import Regulations and Standards (FAIRS) Country Report 2008" This concise document, covering food laws, labeling, packaging, import procedures, and other key regulations, should be required reading for all food exporters. It not only explains the basics, but also provides specific contact information for all the relevant import agencies. It is updated annually. <http://www.fas.usda.gov/gainfiles/200808/146295490.pdf>
- Read other USDA Japan reports and information. Go to the USDA Japan homepage (<http://www.usdajapan.org>) and click the "Reports" menu button to get more market information and reports.
- Check JETRO\* report, "Specifications and Standards for Foods, Food Additives, etc. Under the Food Sanitation Law" (<http://www.jetro.go.jp/en/reports/regulations/pdf/foodadd2007mar-e.pdf>). This summarizes specific technical import procedures, especially for processed food products.

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\* Japan External Trade Organization; see the section on "Reports and Further Information" for more about JETRO.

- Carefully check your food additive admissibility: e.g., preservatives, stabilizers, flavor enhancers. See Appendix D in this report or the Ministry of Health, Labor and Welfare website at <http://www.mhlw.go.jp/topics/yunyu/5/dl/a3.pdf>.
- Ensure that the labeling you plan to use meets Japanese requirements (Food Sanitation Law).
- Verify all relevant import requirements with your Japanese customers. They will normally have the most current information on Japanese regulations.
- Provide a detailed list of product ingredients to your Japanese partners to allow them to verify their acceptability. Do not assume that U.S. approval means Japanese approval.
- For organic foods: Get your organic products approved in the United States under USDA's National Organic Program. Then, working with your importer, you can register your product under the Japan Agriculture Standard (JAS) before importing it into Japan. Review these documents for more information:  
NOP Export Arrangement with Japan  
(<http://www.ams.usda.gov/AMSv1.0/getfile?dDocName=STELDEV3017307&acct=nopgeninfo>)  
MAFF's guide ([http://www.maff.go.jp/soshiki/syokuhin/hinshitu/e\\_label/index.htm](http://www.maff.go.jp/soshiki/syokuhin/hinshitu/e_label/index.htm))
- After you have completed the above steps, check with the Agricultural Affairs Office at the U.S. Embassy in Tokyo ([agtokyo@fas.usda.gov](mailto:agtokyo@fas.usda.gov)) with any remaining questions on issues such as standards, tariffs, regulations, labeling, etc. Depending on content, the ATO's in Japan may also be able to directly respond to your inquiries.

### Import and Inspection Procedures

Your job is not complete when your product has been ordered and shipped. You still must get it through Japanese customs and port inspectors. The points outlined below should aid in this process:

- Review the USDA GAIN Report, Number JA8052, "Japan: Food and Agricultural Import Regulations and Standards (FAIRS) Country Report 2008" (<http://www.fas.usda.gov/gainfiles/200808/146295490.pdf>) to get a better understanding of these procedures.
- Know the specific tariffs that apply to your product before pricing to potential customers. For more information, see ([www.apectariff.org](http://www.apectariff.org)).
- Remember that tariff rates in Japan are calculated on a CIF basis, and that Japan adds a 5% consumption tax to all imports.
- Do not send samples for preliminary checking without an actual request from your importer.
- Recognize that customs clearance officials' application of the law and interpretation of regulations may differ from one port to another. Thus, the least expensive or most convenient port may not be the best choice. Check with your local customer or in-country agent representative.
- Be sure to complete all documentation thoroughly and accurately.
- Sending copies of documentation in advance, especially for first-time shipments can assist your importer in getting timely release of cargo from customs and clarify matters with quarantine officials.

- For fresh products, check phytosanitary and other requirements in advance and obtain proper USDA inspections in the United States (see Appendix D of this report, [www.aphis.usda.gov](http://www.aphis.usda.gov), and [www.fsis.usda.gov](http://www.fsis.usda.gov)).
- Approval is regulated by the Japanese Government for biotech agricultural products and ingredients. These products will also require specific labeling to be admitted to Japan.
- Make sure you have the proper import documents accompanying shipment: 1) Import Notification; 2) Health Certifications; 3) Results of Laboratory Analysis; 4) Manufacturer's Certification showing materials, additives and manufacturing process. (Note: Products imported for the first time may require more documentation.)

### III. Market Sector Structure and Trends

The exporter's single most important strategic decision—other than those dealing with the product itself—is how to position the product and get it to the Japanese consumer, i.e., through retail, food service, and/or food processing channels. Go to the FAS Reports website to see the ATO's "Japan Food Trends", periodic press translations on the Japan food industry and consumer trends. At the URL, <http://www.fas.usda.gov/scripts/AttacheRep/default.asp>, set your search to select Country: Japan, and Subject Text: Japan Food Trends.

The food and beverage industry has continued with restructuring itself to be more efficient and competitive to better respond to the demands of the average Japanese consumer (families and individuals). This is in contrast to catering to major corporations and their large receptions and large expense accounts prevalent in the past. As the ongoing mergers and acquisitions begin to take effect, the Japan food and beverage industry will also seek to decrease operational costs and rationalize its purchases in order to better answer to the Japanese consumer's needs. This effort to streamline itself will allow the Japanese food industry to compete on a global scale as well. Many larger Japanese food firms continue to position themselves for this level of competition by establishing joint investment activities overseas. Therefore, projections for this sector's recovery continue to be modest, perhaps due to the maturity of the Japanese domestic market but also due to this process of realignment in the sector. The food service sector, and particularly HMR, can see stronger growth, in line with demographic and social changes (e.g., higher consumption of precooked and premixed meal preparations as more women work outside the home; increases in single-person households indicates a higher tendency towards simpler meals and eating out; greater institutional demand for such foods as Japan's population ages, etc.). Thus, overall retail sales and sales to food manufacturers is growing at a moderate rate. Most importantly, import growth is likely to be significantly higher in each category than for the sector as a whole.

#### Retail Sector

Japan's food retail market is still fairly fragmented. Unlike North America and the EU, Japan's retail food sector is characterized by a relatively high percentage of general and specialty stores, including "mom-and-pop" stores, and local grocery stores. Such small retailers, however, are losing ground to larger general merchandise stores (GMS), supermarkets (SM), and convenience store (CVS) chains. These last three categories, in particular, offer excellent opportunities for U.S. food exporters, albeit with strong competition from domestic manufacturers and imports from China, Europe, Australia, and New Zealand.

Food retailers in Japan are classified into five major sectors. The characteristics of the main retail channels are listed in the following table:

Table 3. Retail Store Opportunities for U.S. Food Exporters

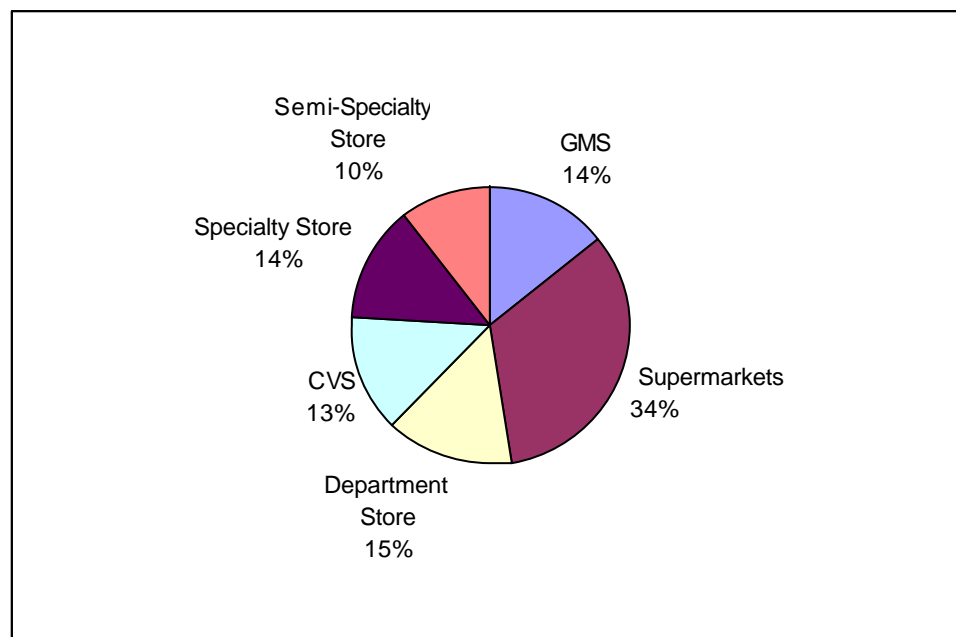
	GMS General Merchandise stores	SM Supermarkets	Department Stores*	CVS Convenience stores	Specialty Stores	Semi Specialty Stores
Share (2007)	14%	34%	15%	13%	14%	10%
Future growth expectations*	M	H to M	M	H	D	D
Receptivity to imports**	H to M	H to M	M	H to M	M	M
Especially good for:						
Established brands	H to M	H to M	H	M	M	M
High quality/high price	H to M	H to M	H	H to M	M	M
Good quality/low price	H	H	M	H	M	M
New products	H	H	H	H	M	M

\*Growth expectations: H - high; M - moderate; L - low; D - decline

\*\*Receptivity ratings: H - high; M - medium; L - low

Sources: METI Commercial Census (2007); ATO estimates on shares and import growth and receptivity.

Chart 1. Retail Food Distribution Channel



Source: METI Commercial Census (2007)

**General Merchandise Stores:** General merchandise stores (GMS), together with supermarkets, are often referred to as “super” in Japan. Japan’s GMS’s, like super centers in U.S., offer shoppers the convenience of one-stop shopping for groceries, perishables, clothing, household goods, furniture, and electrical goods. Food turnover typically makes up one-third of total sales at GMS’s, but are expected to become even more important for some chains.



GMS outlets accounted for 14% of food retail trade in 2007. GMS's are operated by major national chains (Appendix A-1) that have nationwide networks with hundreds of outlets. Central purchasing is typical in these stores.

GMS's are generally receptive to foreign products, although they often require product modification to suit market tastes and preferences. In addition, inventory risks, long lead times, and communication problems make GMS buyers hesitant to import products directly. They often purchase foreign products via trading companies. However, as Japan's retail market becomes more competitive, and regardless of whether they source their products directly or indirectly, GMS's offer excellent opportunities for U.S. food exporters.

**Supermarkets:** Supermarkets (SM) are smaller than GMS's and specialize in food and household goods. On average, they are quite small, only a quarter the size of supermarkets in the United States, but newer stores are larger. Stores typically generate annual turnover of about ¥1 billion, of which perishables, readymade, bakery, and refrigerated foods account for 70% or more of total sales.

As of 2007, supermarkets handled 34% of food retail trade. Over the last 10 years, total store sales have jumped by more than 40%, while the number of stores has risen by 20%. Leading supermarkets are building larger stores, aided by declining land prices and the easing of restrictions on store size. Average retail floor space nearly doubled to 1,000 m<sup>2</sup> in 2004, compared to 500 m<sup>2</sup> - 600 m<sup>2</sup> in 1991.

Supermarkets face higher purchasing costs than GMS stores. They are looking for greater product and service differentiation, own-label development, and global sourcing. To achieve economies of scale, regional supermarkets are forming alliances, such as joint merchandising companies, with non-competing retailers. Thus, although individual retailers are not large enough to engage in direct offshore sourcing, through joint merchandising companies, they offer excellent opportunities for U.S. food exporters. These retailers carry imported products particularly as a means of differentiation from the national chains competing in their region.

**Department stores:** Department store sales have steadily declined in recent years due to growing competition from GMS's and other retailers, in addition to the recession. In 2007, the number of outlets held steady at 15% and total sales have fallen to 5%. Food sales at department stores have declined in tandem, and now currently account for only 5% of total food sales.

Nevertheless, department stores are an under-exploited channel for many U.S. exporters (Appendix A-2). Most department stores have extensive basement concessions (i.e., small, independently operated retail stands), otherwise known as 'depachikas'. There are also outlets operated by department stores themselves, offering an opportunity for U.S. exporters to launch pilot stores or to conduct marketing trials. Department stores provide a showcase for imported, novelty, and high-end products. They thus provide excellent opportunities for U.S. exporters of high-quality and fancy foods.

**Convenience stores:** Convenience stores (CVS) are an extremely important sales channel in Japan. The CVS sector is quite concentrated, with the top five operators holding 90% market share. Seven-Eleven

Japan, the largest CVS operator, has nearly 12,000 outlets in Japan. The share of food sales held by convenience stores and Seven-Eleven, Japan's single largest food retailer is 13%.

The convenience stores or “conbini” in Japanese, have very limited floor space, about 100 m<sup>2</sup> on average, and typically stock about 3,000 products. They are well known for their high turnover and advanced inventory management. Over 90% of CVS are not owned, but franchised.

The approach of Japanese CVS's to merchandising is unique and innovative. Ready-made foods, such as boxed lunches, make up about 40% of total sales. Because there were relatively few large manufacturers of ready-made food, CVS operators developed original products in collaboration with suppliers. This “team merchandising” approach extends to branded grocery lines as well. Team merchandising has also influenced Japan's food and drink manufacturers. Currently 30–50% of sales at CVS's are original products or exclusive brands.

Convenience stores derive their competitive advantage based on high turnover and extremely efficient supply chains. Thus, short lead-time and nationwide distribution are essential in dealing with major CVS operators. While this presents a significant challenge for many overseas companies, indirect business nevertheless offers huge potential for exporters. Global sourcing, especially for ingredients and raw materials used in fast food, has become more popular. CVS operators not only work with consumer product manufacturers but also with trading firms and ingredients manufacturers. In order to differentiate themselves from their competitors, major CVS operators are constantly searching for novelty and new concepts, which offer good opportunities for U.S. food exporters.

**Local General and Specialty Stores:** Predominantly, Japan's food retail trade still consists of local specialty stores and grocery shops, most of which are small, family-run operations. These retailers, however, offer limited market potential for exporters. They are served by secondary or tertiary wholesalers, which, in turn, are supplied by Japan's major wholesalers. This sector has been shrinking rapidly as the food market has become more competitive. Deregulation of liquor licensing, for example, has led to the closure of many small liquor shops. Certain retailers located principally in the Tokyo metro market specialize in imported products and may offer the shortest path for selling imported foods at retail (particularly snacks and novelty items) unmodified for the Japanese market.

**Home Meal Replacement Sector:** The Home Meal Replacement (HMR) sector accounted for 9.5% of food sales to consumers in 2007. It also represents more than 10 percent of many retailers' total sales and is now one of the key battlegrounds for food sales in Japan. As in North America and the EU, the strong growth of HMR is one of the most important developments in the Japanese food sector in recent years. Examples of popular products in this sector are prepared foods sold at supermarkets, takeout meals sold at specialty store chain operators, and various readymade foods sold at convenience and department stores. There is thus some overlap with the channels outlined above.

In recent years, HMR sales have grown 5% to 8% annually, and the sector is a driving force in Japan's food and drink market. Demand for cheaper, more convenient, and better tasting food is expected to spur further growth in the HMR sector as the number of working women, single households and elderly rise.

Although the sector consists mostly of small regional companies, consolidation is increasing. These larger producers, in turn, supply major supermarket operators and convenience stores, and tenants in department stores. There are a number of constraints facing U.S. exporters in this sector. High-volume buyers are still relatively rare; global sourcing and direct transactions with foreign suppliers are also uncommon. In addition, relatively high turnover for menu items often makes companies hesitant about global merchandising. Nevertheless, HMRs are potentially an ideal customer for U.S. food exporters, especially those willing to meet stringent cost, quality, pre-cooking and size specifications. The major HMR producers are listed in Appendix B-4.

**Overall Trends in the Retail Sector:** Private branding, which appeared in the market in the past based on only a low-price strategy and failed, now has settled back into the market. Not only offering low price, private branding in Japan also places more emphasis on quality and safety assurance. Gaining in popularity, private branding is available in national chain stores, high-end urban retailers and member stores of group cooperatives.

The competition among the larger more viable segments in the retail sector, GMS, Supermarkets, Departments Stores and Convenience stores has created pressures on Japan's traditional distribution channels to adapt to retailer's needs. Generally, to remain viable these retail segments require constant attention to maintaining a large variety of products on the shelves and to be able to adjust quickly to popular consumer trends. To do this, these retailer segments can no longer depend on a distribution channel that does not quickly respond to these requirements. As a result, the GMS segment has continued the trend of increasing direct procurement from producers and/or contracted with certain wholesalers to serve as their own intermediary. In response, smaller less efficient providers in the distribution channel are in the midst of mergers or acquisitions to achieve improved economies of scale. According to a recent JETRO report:

"Rationalizing the structure of distribution and cutting the cost of physical distribution is especially urgent for large retailers that carry a wide range of different products and need to lower operating costs, including GMSs, Supermarkets, convenience stores, home centers and chain drugstores.....As a result, wholesalers in the food, miscellaneous goods, drug and cosmetics sectors increased the size of their businesses through mergers and acquisitions and by creating corporate groups."

(Source: *Guide to Business Opportunities in Japan (Retail, Wholesale, and Food Service Market)*, Japan External Trade Organization, <http://books.jetro.go.jp/en/>)

### **HRI Food Service Sector**

The Japanese food service sector accounted for approximately 37.8% of consumer food sales in 2007. Food service encompasses four major segments: 1) restaurants; 2) hotels and other accommodation facilities; 3) bars, cafes, and coffee shops; and 4) institutional food service companies serving schools, hospitals, and corporate facilities. The characteristics of these four segments are summarized in the following table.

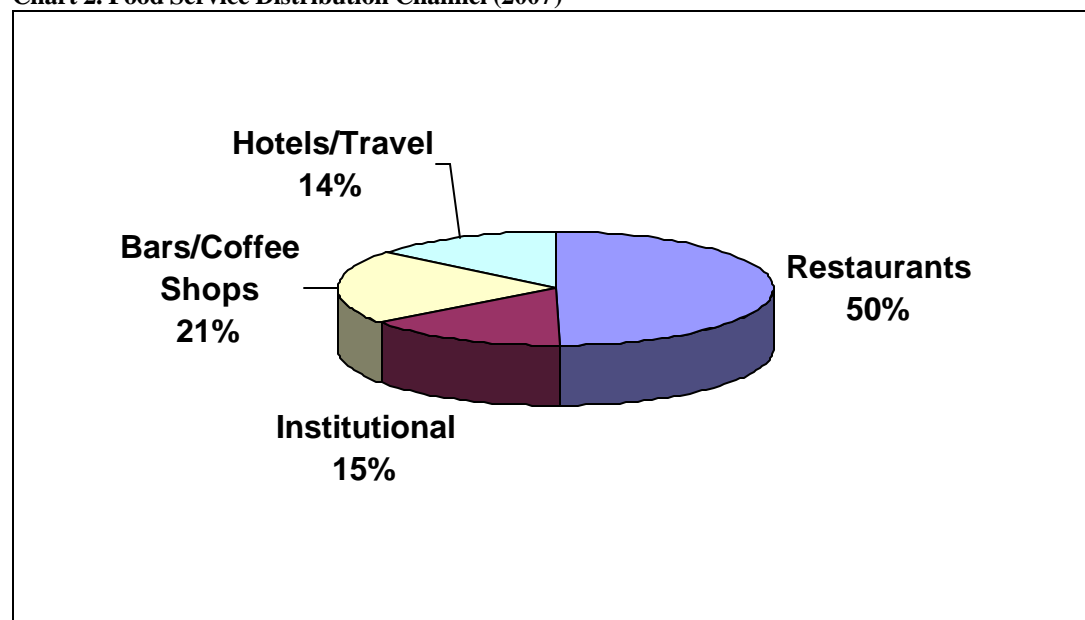
**Table 4. Food Service Opportunities for U.S. Food Exporters**

	<b>Restaurants</b>	<b>Hotels/ Travel related</b>	<b>Bars/ Coffee shops</b>	<b>Institutional</b>
<b>Share (2007)</b>	50%	14%	21%	15%
<b>Future growth expectations*</b>	H to M	H	H to M	M
<b>Receptivity to imports**</b>	H	H	H to M	H
<b>Especially good for:</b>				
High quality/high price	H to M	H	M	L
Good quality/low price	H	H	H	H
New products	H	H	H	H

\*Growth expectations: H-high; M-moderate; L-low; D-decline

\*\*Receptivity ratings: H-high; M-medium; L-low

Sources: Food Service Industry Research Center 2007; ATO estimates of import growth and receptivity).

**Chart 2. Food Service Distribution Channel (2007)**

Source: Food Service Industry Research Center

**Table 5. Share of Restaurant Sales by Type of Outlet (2007)**

General restaurants	71.4%
Noodle shops	8.5%
Sushi shops	10.5%
Other	<u>9.6%</u>
	100.0%

Source: 2007 Food Service Market Data by Food Service Industry Research Center

**Restaurants:** The restaurant segment offers the best export prospects for the United States among the four food service segments covered in this report. These commercial outlets generate nearly half of current food service sales. The restaurant segment comprises four main types of outlets as shown in the box above. The restaurant segment had approximately JP¥8.6 trillion (US\$ 78 billion) in sales in 2005, at more than 235,000 outlets. However, as with retail, the sector is quite fragmented and most restaurant businesses are quite small, with a little less than 70% of outlets run by individuals or families.

While restaurant sales still show a decline of 2% from 2000 through 2005, it is a small decline, for example compared to 7% from 1997 to 2002. Overall statistics reflect a generally weak performance; however larger, family-style chains with specialized formats continue to show promise. Smaller, family-owned restaurants have been disappearing rapidly due to increased competition from HMR, food retailers, and restaurant chain operators using the new, more specialized formats, where public relations and/or brand recognition is a key to long term success.

Several major “family restaurant” chains are increasingly important in the segment. Because they compete primarily on price, compared to their smaller rivals, they are much more active in global sourcing. These chains thus represent a significant opportunity for U.S. food exporters. Chain restaurants are particularly interested in semi-processed or precooked foods. Premixed ingredients, seasonal fruits and vegetables, specialty sauces and seasonings, and desserts are particularly attractive products for chain operators.

Japan has a large and competitive fast food segment made up of both domestic and overseas operators. Most *gyudon* (beef bowl) restaurant chains have long been big U.S. beef buyers, and they suffered major losses from the ban on U.S. beef imports due to BSE. Generally, fast food restaurant operators are volume buyers of specific raw materials. In addition to low cost, suppliers must provide a stable supply of products at a specific quality to compete effectively in this segment.

Exporters can approach most large restaurant chains directly but for the smaller chains, exporters must build relationships with trading companies or major food service wholesalers.

**Hotels and travel related:** Major hotels are attractive markets for U.S. exporters. Most hotels are chains and over 40% of their income, on average, comes from food service. Hotels, especially, are more oriented toward Western food and frequently have “food fair” promotions featuring different countries’ cuisines. The exporter’s challenge lies in developing effective distribution channels to reach them. Hotels offer high consumer visibility and thus promotional value for exporters. Highlighting the fact that a particular exporter’s product is used by a major upscale hotel chain, for example, is a good means of promoting the product to retailers and other prospective buyers.

Railway companies and airlines operate kitchens in Tokyo and Osaka, while the overseas airlines tend to use contract caterers. These Japanese companies may tend to emphasize Japanese cuisine and thus are somewhat less receptive to imported Western products. Theme parks are also an important part of the sector. The restaurants and snack outlets at both Tokyo Disneyland and Universal Studio Theme Park, for example, draw millions of visitors every year. Other theme parks around the country also attract thousands of visitors a day.

**Bars and coffee shops:** These establishments account for 21% of total food service sales. Although bars have been in decline, mainly due to the recession, coffee shops—especially chain operators—continue to show significant growth. Foreign chains such as Starbucks have made significant inroads in Japan over the last few years. Both bars and coffee shops are major markets for beverages and snack foods (e.g., sandwiches, pastries).

**Institutional food markets:** The institutional market is comprised of cafeterias at factories and offices (53%); hospitals (27%); school cafeterias (20%) and account for 15% of total food service sales. These institutions operations are typically served by contract caterers. Building relationships with caterers is therefore essential to crack this market. Both contract caterers and institutions with their own kitchens are typically serviced by large food service wholesalers. Because the most important criterion for institutional suppliers is cost competitiveness, the sector offers huge market potential for U.S. exporters, which often enjoy significant advantages in this respect.

In line with the overall food service sector, the contract catering market has been shrinking in recent years. This is mainly due to sluggish economic conditions, characterized by corporate layoffs, consolidation of offices and factories, and cutbacks in corporate fringe benefits. Long term, however, prospects are brighter due to higher demand from contract caterers serving the hospital and social welfare segments. This growth will be driven by an aging population, reforms to the medical insurance program for the elderly, and the launch of a nursing care insurance program.

### Food Processing Sector

Appendix C lists the most important food manufacturers in several food sectors. These food processors offer a number of opportunities to U.S. exporters, and they have the capacity to buy the following types of products from overseas:

- Ingredients for production in Japan;
- Finished products sold under their own labels;
- Finished products sold under the exporter's brand, but distributed through the importer's channels.

Dealing with food processors offers a number of advantages:

- They often buy in large volume;
- They have sophisticated distribution systems;
- They have a good understanding of their suppliers' businesses.

Be prepared as manufacturers are very demanding regarding the release of data on product quality, scientific data, origin of ingredients, and other related information. In large part, the trend in regulations from the Government of Japan requires manufacturers to protect themselves from risks. Such information is also increasingly important because of recent food scandals in Japan, and growing concerns about food

safety and traceability among consumers. U.S. exporters must be prepared to deal positively and promptly with these issues to compete in this market.

For more information on this segment, please see the Japanese Food Processing Sector Report produced by the ATO in Tokyo, Japan (<http://www.fas.usda.gov/gainfiles/200703/146280587.pdf>). Also, periodically review the numerous reports from the Ag. Affairs Office for changing regulations on food additives on the FAS Attaché Reports page: <http://www.fas.usda.gov/scriptsw/AttacheRep/default.asp>.

### Online Sales in Japan

In 2008 the total number of Internet subscribers were 94 million compared to 48 million in 2000. In 2004, the value of Internet transactions by individuals and households increased by 28% to ¥5.64 trillion or \$51.3 billion. In that total, cosmetics and health food sales combined for an increase of 44.2 percent over the previous year valued at ¥222 billion or \$2 billion. In 2005, 39.7% of consumers had purchased goods and services through the internet yet there is still a lot of room for Internet transactions to expand in terms of the overall market. As of 2005, e-commerce accounted for only 1.3% of the total retail market with annual sales of ¥130 trillion.

<b>Table 6. Japan Websites Selling Food Products</b>	
<b>Company Name</b>	<b>Site Address</b>
Rakuten, Natural Food Market	<a href="http://event.rakuten.co.jp/">http://event.rakuten.co.jp/</a>
e-Yukiseikatsu	<a href="http://www.eu-ki.com/">http://www.eu-ki.com/</a>
Oisix Co., Ltd.	<a href="http://www.oisix.com/">http://www.oisix.com/</a>
Pal System Consumers Cooperative Union	<a href="http://www.pal.or.jp/group/">http://www.pal.or.jp/group/</a>
Radish Boy a	<a href="http://www.radishbo-ya.co.jp/">http://www.radishbo-ya.co.jp/</a>
Polan Organic Farming Association (POFA)	<a href="http://www.polan.net/">http://www.polan.net/</a>
Tengu Natural Foods	<a href="http://www.alishan.jp/shop/nfoscomm/catalog/">http://www.alishan.jp/shop/nfoscomm/catalog/</a>

Source: JETRO

### Population Trends

Japan's population has undergone dynamic shifts in age proportions since the 1980's with decreasing numbers of births and a growing aging population. Until recently, Japan had been experiencing small but steady annual population growth. It was not until the first part of 2005 that Japan experienced negative population growth, when the number of deaths in the first half of the year outnumbered the number of births by 31,034. Although the number of births typically tends to rebound in the latter half of the year, the Ministry of Health, Labor and Welfare (MHLW) show Japan experienced a -0.01% population decline in 2005. A decline in population was not expected until 2007, coined the "Year 2007" problem, a name that came from the year in which experts originally predicted that the Japanese population would begin declining. In 2006, Japan's population held steady at 127.77 million. By the year 2050 Japan's population is predicted to be at 95 million, with the ratio of individuals over 65 climbing from 7% (in the 1970's) to 40% respectively.



#### IV. Best High-Value Import Prospects

In this section, we present a list of such prospects identified as “best prospects” by the ATOs in Japan.

##### Best Prospects

The following presents a list of products, which at the present time we believe can be considered “best” import prospects. They were selected based on a number of criteria—high volume, demonstrated growth, and U.S. competitiveness. Other products selected are not generally available in Japan, because they fit a growing need (e.g., aging/health) or because they represent a unique concept that offers significant potential.

**Table 7. Best Import Prospects**

Product Category	HS Code	2007 Market Size (1,000 MI)	2007 World Imports (1000 MT)	5-Yr Avg. Annual Import Growth	Import Tariff Rate	Key Constraints to Market Development	Market Attractiveness for U.S.A.
Pork	0203	1627	755	-3%	JPY361~482 per kg	Currently, market growth of U.S. beef is not expected to effect consumption of pork, but if Japan were to end age restrictions on beef, pork consumption would fall.	In 2008, pork imports from Jan-Jul have increased by 22% from 2007. This is mainly due to increased production and feed cost of domestic producers
Snack Food (excl nuts)	1905.90 2106.90.924	327	106	47%	6%~34%	Snack food companies have had products pulled from shelves due to Chinese tainted milk scandal. This could affect U.S. suppliers who use milk products from China as ingredients.	Suppliers that can offer custom packaging and flexibility on ingredients and production process will have greater success over others. Products containing healthy, functional ingredients have stronger consumer appeal.

Frozen Vegetables	0710 2004	871	773	11%	6%~23.8%	Recent pesticide contamination in Chinese food products may deter consumers from purchasing frozen food Products. Also, Japanese frozen food companies are becoming more active overseas to bring frozen products into Japan.	The market for imported frozen vegetables has quadrupled over the last 20 years. As Japanese consumers become more familiar with frozen foods, demand will increase. Also, the U.S. is the largest supplier of frozen potato products.
Peanuts	1202		36	-4.74%	JPY617~726 per kg and/or 10%	China will resume exporting soon, after quality issue is resolved. Peanuts from China are inexpensive compared to peanuts from the United States.  MRL and aflatoxin are barriers for U.S. shellers to meet Japanese regulations	China, which supplies 74% of Japan's peanut market, has stopped exporting peanuts to Japan due to quality issues. This leaves the industry with a severe shortage of peanuts.
High Quality Natural Fruit Juice	2009	901,673 KL	321673 KL	31%	JPY23~27 per kg or 5.4%~29.8%	Strong competition from China and Brazil, with some lesser-producing countries gaining market share as well.	World imports are increasing in Japan as consumers become more health conscious. Imports from the U.S. increased by 22% in 2007, and are expected to increase in 2008. Orange and grapefruit juice have the largest share.
Berries	0810.20 0810.40 0811.20	6.2	4.7	38%	6%~9.6%	The U.S. market share of imports has decreased from 40% to 32% in the last 5 years, and world imports are expected to be low in 2008. Promotional effort is needed.	Varieties falling under HS code 0810.20 have seen a steady increase over the last 5 years. Increasing competition from Mexico is still minor.

Tree Nuts	0801 0802	79	65.6	-24%	Free~12%	The U.S. does produce significant imports to Japan of products in HS 0801. While competition is not increasing their market share, U.S. producers should keep safety issues a top priority to ensure U.S. imports remain high.	Increasing consumer awareness and health benefits of nuts has increased consumption recently. Producers should continue promotion in baking and confectionary sectors, as well as exploring new sectors.
Wine	2204	239,796 KL	174.441 KL	0.25%	15% or JPY125 per liter, whichever is the less, subject to a minimum customs duty of JPY67 per liter.	Japanese wine market is very competitive, with France and Italy leading exports respectively, and The U.S. following with 14.6% of the import market in 2007. While the U.S. has excelled in the lower end of the market, the development of mid-range products will be a challenge for the United States.	Total imports have remained stable, confirming that the Japanese wine market has recovered. The value of U.S. imports has increased due to marketing programs, the strong yen, and increasing sales of more moderately priced New World and California wines.
Pet Food	2309	773	407	-8%	Free~PY59.5 per kg, plus JPY6 for every 1% exceeding 10% by weight of lactose contained.	Contaminated pet food from China has led the Japanese government to create regulations for per food applying to manufacturing, import and distribution. Producers should be sure their products comply.	While the number of pets in Japan is increasing, pet size is decreasing, resulting in less consumption. U.S. producers should concentrate on high-quality products for smaller animals.
Cakes, Waffles, Pies	1905	608	112	51%	9%~29.8%%	Rising price of inputs has decreased total world imports into Japan. China has increased market share while the U.S. has decreased over the last 5 years.	The average price for U.S. products remains competitive with China, possible allowing the U.S. to acquire market share in the wake of Chinese tainted food scandals.

Salmon	0302.12 0303.11 0303.19 0303.22	387	152	-17%	3.5%	Farm raised frozen Salmon from Norway and Chile continues to dominate the market along with an increase in fresh salmon exports from Canada. Prices have risen due to the increase in global oil prices. Reduction in Japanese fish purchases due to a shift towards increased meat consumption.	There is an increase in the demand for US "natural" and "wild" salmon as opposed to the farm raised salmon. Seasonal promotion remains a plus.
Non-alcoholic Beverages	2202.90 2209.00	74,862 KL	72,675 KL	107%	9.6%~13.4%	Competition from the major Japanese domestic brands and the growing variety of other imported non-alcoholic beverages.	Market is continually growing with a strong demand for health conscious and diet drinks. The higher cost of beer and other alcoholic beverages will result in the continued attraction of these alternative products.
Functional Foods	--	JPY1.2 trillion	--	--	See specific product category	Japan has important food standard requirements that must be met. For the Japanese to recognize any new beneficial aspects of food, scientific evidence, education and promotion is necessary.	Market growing very rapidly; grown 61% in the past 6 years. The aging population is growing segment of interest, as well as products targeting specific health conditions.

Food Preparation Products	2106.9	--	369	36%	9%~29.8% +JPY1,159per kg	Health issues are a major concern in Japan. Japanese consumers consider Japanese products to be safer than overseas products, so producers should make sure their products comply with Japanese regulations and be willing to tailor their product to the Japanese market.	Key market drivers such as declining home cooking and greater demand for convenience and ready-to-eat foods indicate that demand for processed food products should continue to grow for the foreseeable future.
Craft Beer	2203	3,491,118 KL	31,830 KL	-11%	Free	Japanese government imposes higher tax on beer compared with other liquors.  Five major domestic brewers control 98.4% of the beer market	Redevelopment projects create new pubs and restaurants increasing opportunity and market places for craft beer.  Holidays and special occasions offer good times to market high quality products.

Sources: ATOs; Ministry of Agriculture, Forestry and Fisheries; Ministry of Economy, Trade and Industry; Ministry of Finance; Japan Frozen Food Association; Chocolate and Cocoa Association of Japan; Pet Food Manufacturers Association; Zenkoku Seiryō Inryō Kōgyōkai; Fuji Keizai; Brewers Association of Japan. Note: The 2007 market size is an estimate made by ATO.

## V. Key Tables and Charts

These following tables and charts are included to provide U.S. exporters with a better understanding of Japanese food market and economy.

**Table A. Key Trade & Demographic Information**

*Data is for 2007*

Agricultural Imports From All Countries (\$Mil)/U.S. Market Share (%)	\$68,138 / U.S.21.28%
Consumer Food Imports From All Countries (\$Mil)/U.S. Market Share (%)	\$23,965 / U.S. 18.88%
Edible Fishery Imports From All Countries (\$Mil)/U.S. Market Share (%)	\$12,764 / U.S. 9.17%
Total Population (Millions)/Annual Growth Rate (%)	127.7 Mil. / 0.01%
Number of Major Metropolitan Areas <sup>/1</sup>	12
Per Capita Gross Domestic Product (U.S. Dollars)	\$33,600
Unemployment Rate(%)	3.9%
Percent of Female Population Employed <sup>/2</sup>	46.6%
Exchange Rate (Japan Yen per US\$)	Ann. Avg. – 117.93

1/Population in excess of 1,000,000

2/Percent of women in the labor force (15 years old or older); Statistics Bureau MIC

Sources: World Trade Atlas; Ministry of Health & Welfare; Statistics Bureau, Ministry of Internal Affairs and Communication; U.S. Bureau of Labor Statistics; World Bank; Bank of Japan; CIA World Factbook, and the National Institute of Population and Social Security Research

**Table B. Consumer Food and Edible Fishery Product Imports**

Japanese Imports (in Millions of Dollars)	Imports from the World			Imports from the U.S.			U.S. Market Share %		
	2005	2006	2007	2005	2006	2007	2005	2006	2007
<b>CONSUMER-ORIENTED AGRICULTURAL TOTAL</b>	24,187.65	22,924.99	23,964.73	4,575.90	4,218.53	4,525.64	18.92	18.40	18.88
Snack Foods (excl Nuts)	458.54	476.15	518.78	39.45	39.22	40.51	8.60	8.24	7.81
Breakfast Cereals & Pancake Mix	14.58	14.95	16.32	3.32	3.22	2.72	22.79	21.56	16.63
Red Meats, Fresh/Chilled/Frozen	7,032.57	5,715.85	5,972.38	1,476.84	1,223.79	1,493.35	21.00	21.41	25.00
Red Meats, Prepared/Preserved	1,830.57	1,955.77	2,027.34	171.91	206.39	248.75	9.39	10.55	12.27
Poultry Meat	922.17	744.04	752.29	45.82	33.85	40.17	4.97	4.55	5.34
Dairy Products	424.20	407.37	553.93	74.05	60.03	74.56	17.46	14.74	13.46
Eggs & Products	160.24	114.58	123.53	57.25	36.85	31.15	35.73	32.16	25.22
Fresh Fruit	1,601.25	1,523.65	1,577.65	458.09	435.03	414.96	28.61	28.55	26.30
Fresh Vegetables	868.28	827.67	661.93	125.03	116.06	98.65	14.40	14.02	14.90
Processed Fruit & Vegetables	3,254.93	3,381.06	3,430.39	555.66	588.37	612.46	17.07	17.40	17.85
Fruit & Vegetable Juices	596.70	632.00	783.53	108.02	102.98	135.92	18.10	16.30	17.35
Tree Nuts	399.58	378.13	347.46	231.93	230.61	212.05	58.04	60.99	61.03
Wine & Beer	1,077.09	1,229.32	1,317.61	61.22	69.55	76.26	5.68	5.66	5.79
Nursery Products & Cut Flowers	463.90	479.80	509.83	8.61	8.23	8.68	1.86	1.72	1.70
Pet Foods (Dog & Cat Food)	711.32	699.99	681.65	711.32	699.99	681.65	100.00	100.00	100.00
Other Consumer-Oriented Products	3,637.13	3,621.97	3,848.45	881.65	810.43	817.12	24.24	22.38	21.23
<b>FISH &amp; SEAFOOD PRODUCTS</b>	14,175.75	13,523.12	12,763.90	1,384.08	1,256.13	1,171.04	9.76	9.29	9.17
Salmon, Whole/ Eviscerated/Canned	832.96	764.31	756.44	155.86	84.38	94.90	18.71	11.04	12.55
Crustaceans	3,993.44	3,991.10	3,673.02	81.40	90.65	67.25	2.04	2.27	1.83
Surimi (Fish Paste)	749.44	691.58	706.58	299.46	263.34	256.14	39.96	38.08	36.25
Molluscs	1,354.45	1,281.58	1,252.23	55.57	46.08	45.56	4.10	3.60	3.64
Other Edible Fish & Seafood	5,078.87	4,538.17	4,197.71	518.37	472.71	416.92	10.21	10.42	9.93
<b>AGRICULTURAL PRODUCT TOTAL</b>	40,033.21	39,384.38	43,601.34	10,644.28	10,183.90	12,456.77	26.59	25.86	28.57
<b>AGRICULTURAL, FISH &amp; FORESTRY TOTAL</b>	65,135.46	64,750.77	68,138.03	12,924.13	12,326.06	14,501.85	19.84	19.04	21.28

Source: World Trade Atlas

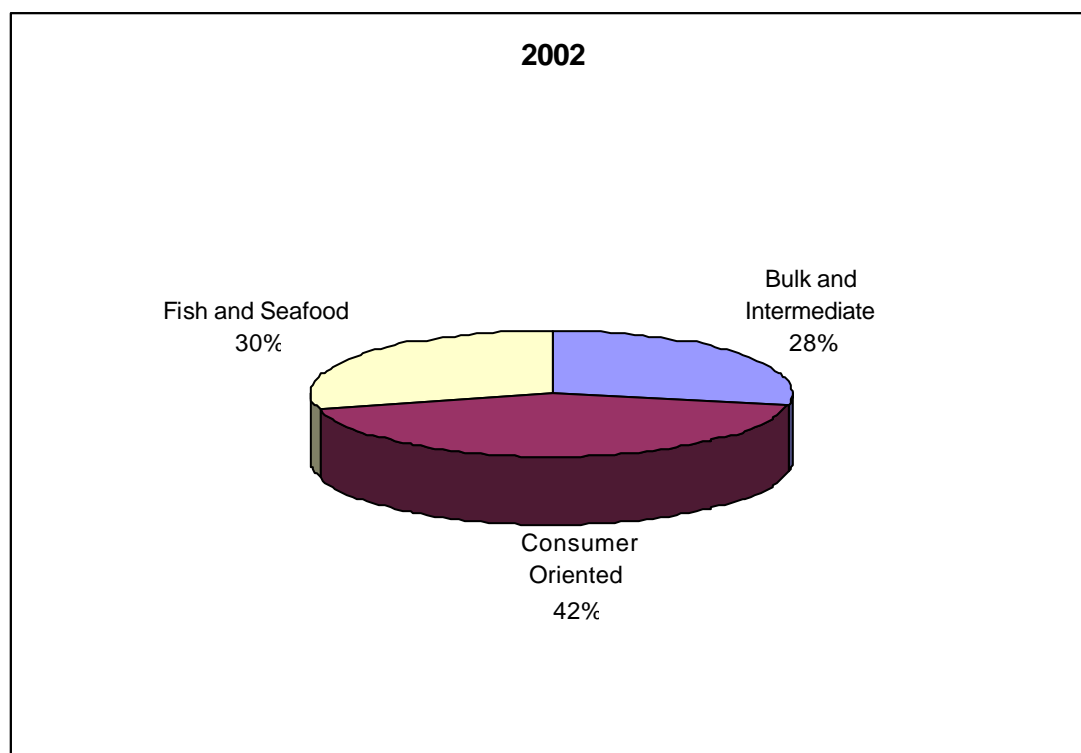
Table C. Top 15 Suppliers of Consumer Foods and Edible Fishery Products

Japan - Top 15 Suppliers							
CONSUMER-ORIENTED AGRICULTURAL				IMPORTS FISH & SEAFOOD PRODUCTS			
\$1,000	2005	2006	2007		2005	2006	2007
United States	4,575,900	4,218,526	4,525,641	China	3,089,240	3,147,946	2,695,145
China	4,023,311	4,253,272	4,213,625	United States	1,384,083	1,256,133	1,171,038
Australia	3,109,801	2,835,087	2,834,009	Russia	1,122,215	982,872	1,018,159
France	1,187,176	1,369,693	1,481,741	Thailand	979,440	954,888	971,524
Thailand	1,252,590	1,310,049	1,365,849	Chile	834,289	911,921	885,811
New Zealand	1,071,303	985,461	1,047,432	Indonesia	735,219	697,353	692,798
Canada	1,230,344	932,253	973,084	Vietnam	774,396	789,917	688,417
Brazil	1,025,289	899,941	963,366	Taiwan	858,145	626,584	552,137
Denmark	1,317,869	898,955	866,155	Korea South	648,882	567,764	526,323
Philippines	695,102	655,191	705,232	Norway	488,986	381,987	441,791
Italy	462,859	477,441	533,742	Canada	484,266	434,282	410,963
Mexico	422,882	428,683	471,779	India	281,987	307,233	299,697
Netherlands	373,749	408,631	471,159	Australia	324,510	305,982	298,820
Korea South	530,839	461,842	466,379	Philippines	162,056	175,535	166,632
Chile	450,230	399,869	393,887	Morocco	96,649	99,786	129,175
Other	2,458,410	2,390,094	2,651,655	Other	1,911,388	1,882,933	1,815,470
World	24,187,654	22,924,988	23,964,734	World	14,175,752	13,523,116	12,763,900

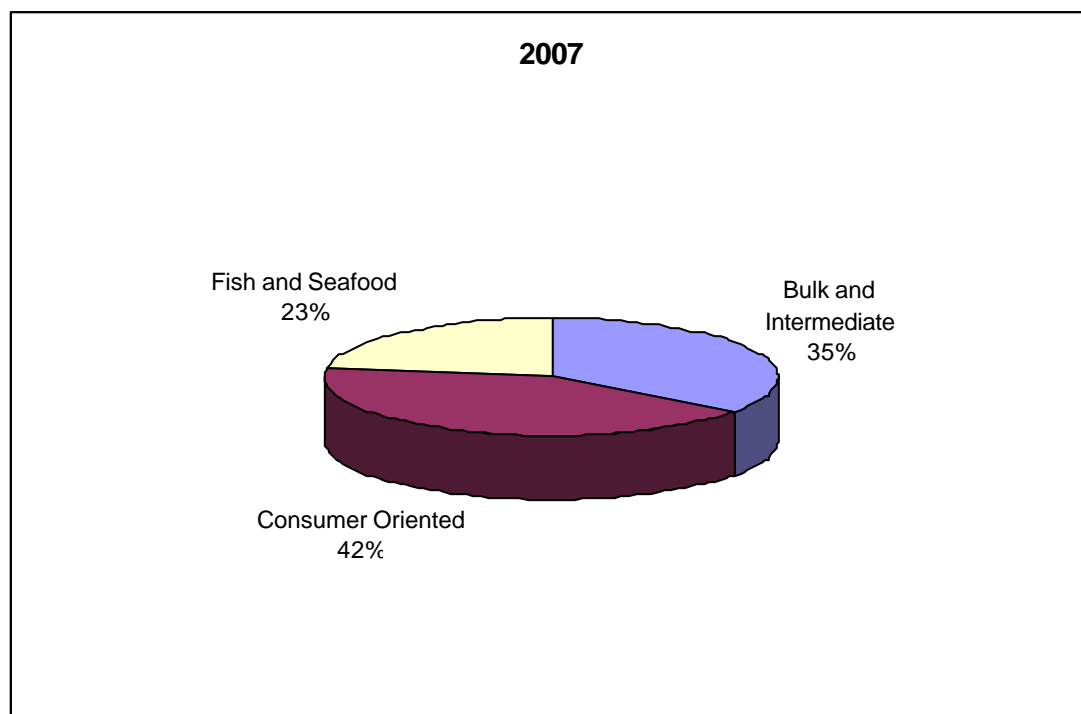
Source: World Trade Atlas



Chart 1. Change in Japanese Food Import Mix from All Sources

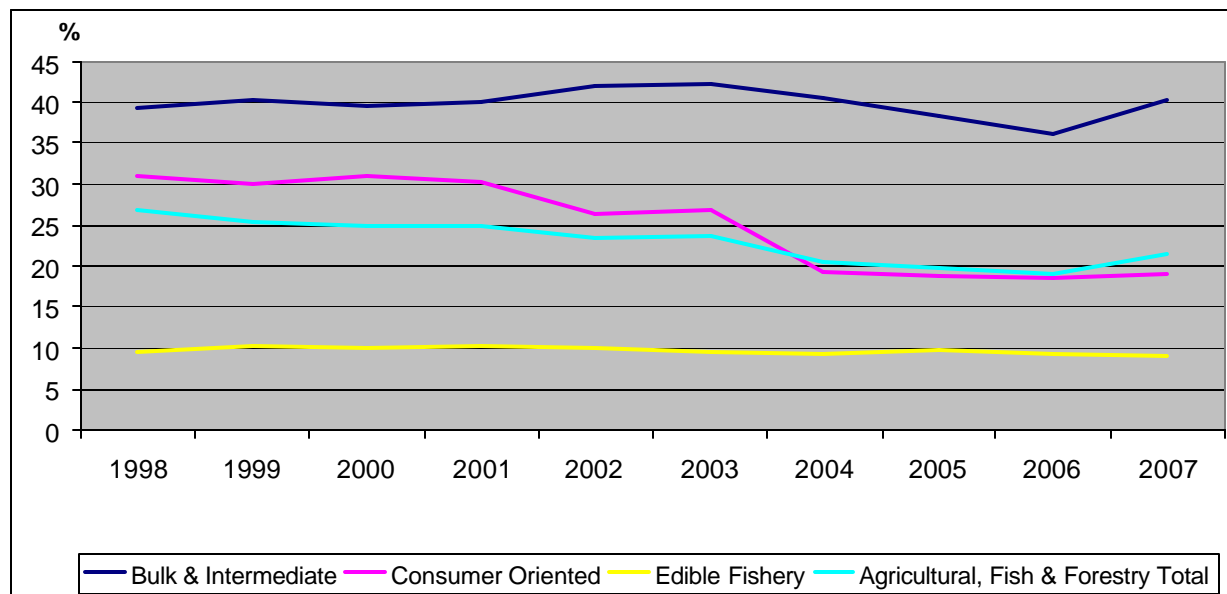


Source: UN Trade Statistics



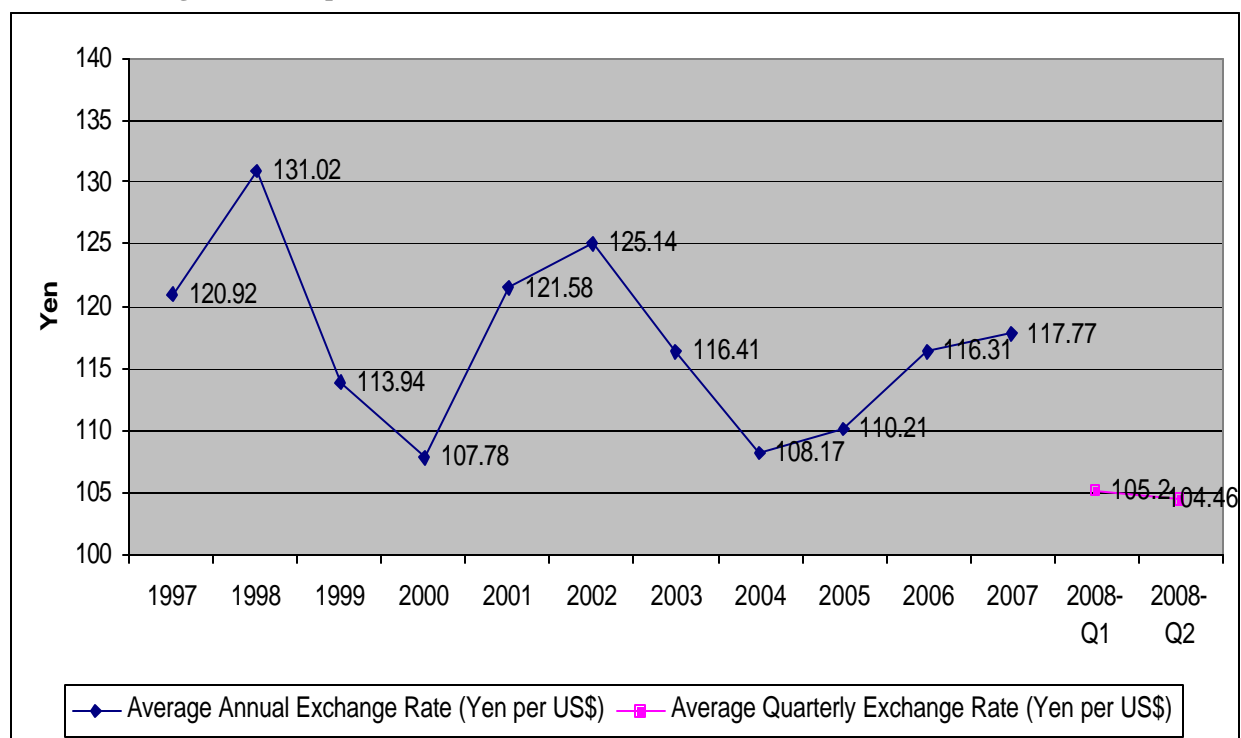
Source: UN Trade Statistics, JBICO, World Trade Atlas

Chart 2. Trends in U.S. Shares of Japanese Food and Agricultural Imports



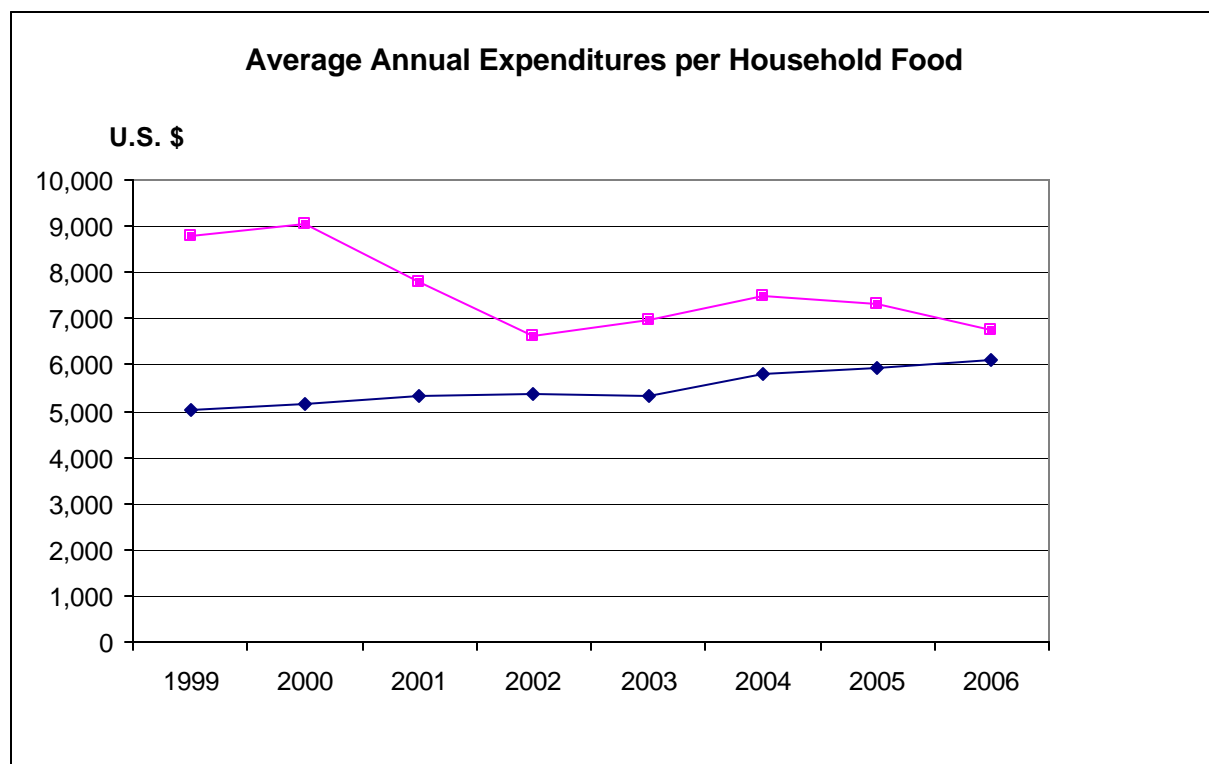
Sources: World Trade Atlas; Japan Customs.

Chart 3. Exchange Rate (JPY per US\$) 1997-2008



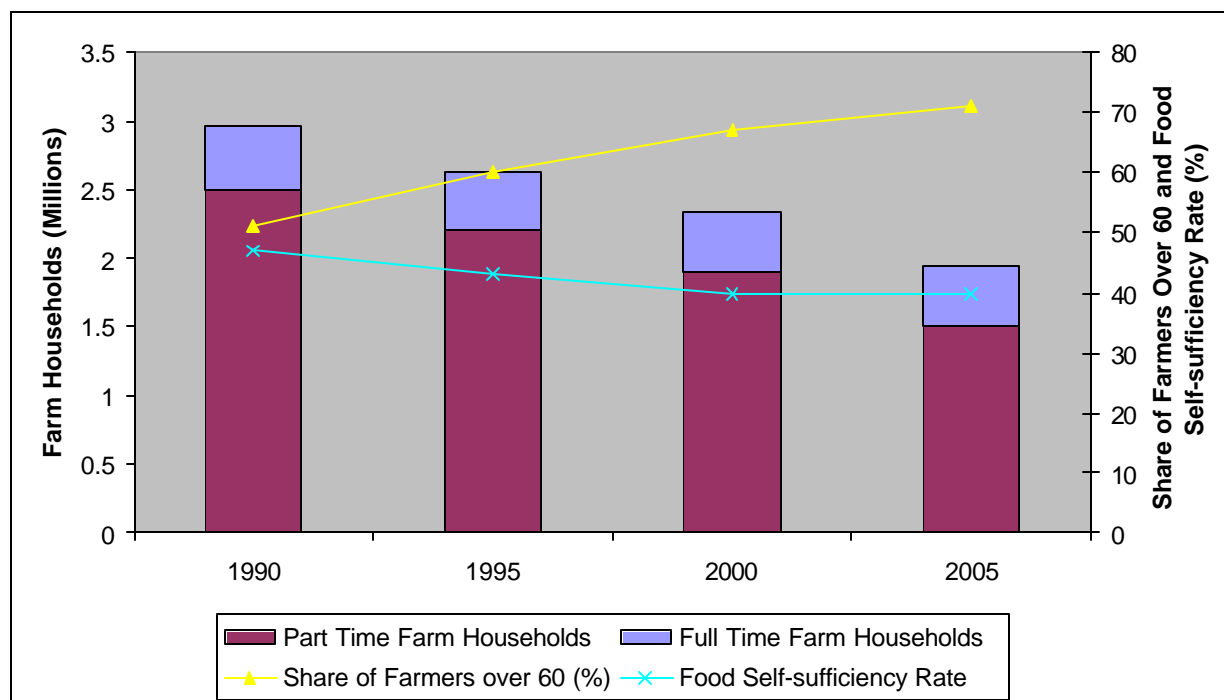
Source: Bank of Japan

Chart 4. Japan's Food Expenditure Compared to the United States



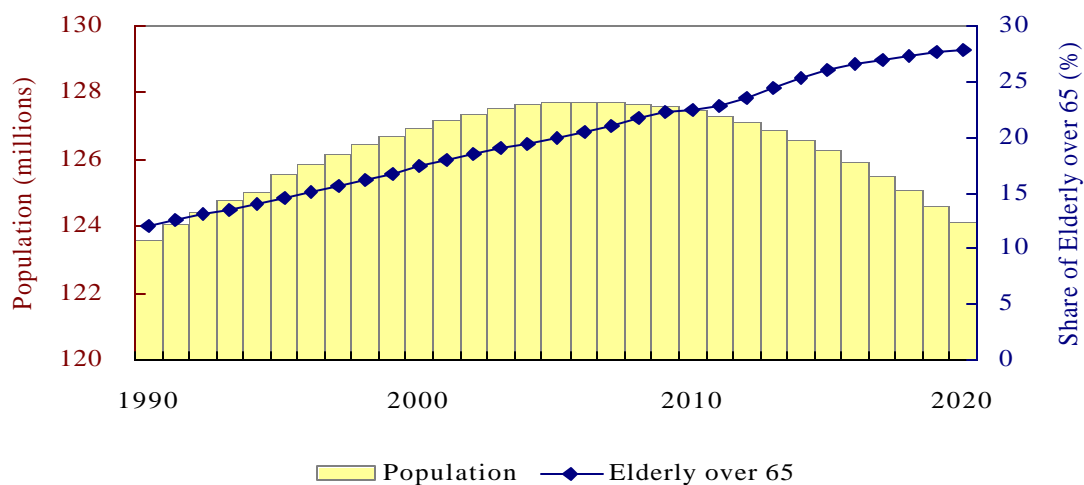
Sources: U.S. Department of Labor; Ministry of Internal Affairs and Communications

Chart 5. Japanese Food Self-sufficiency Rate and Declining Farmer Population (1990-2005)



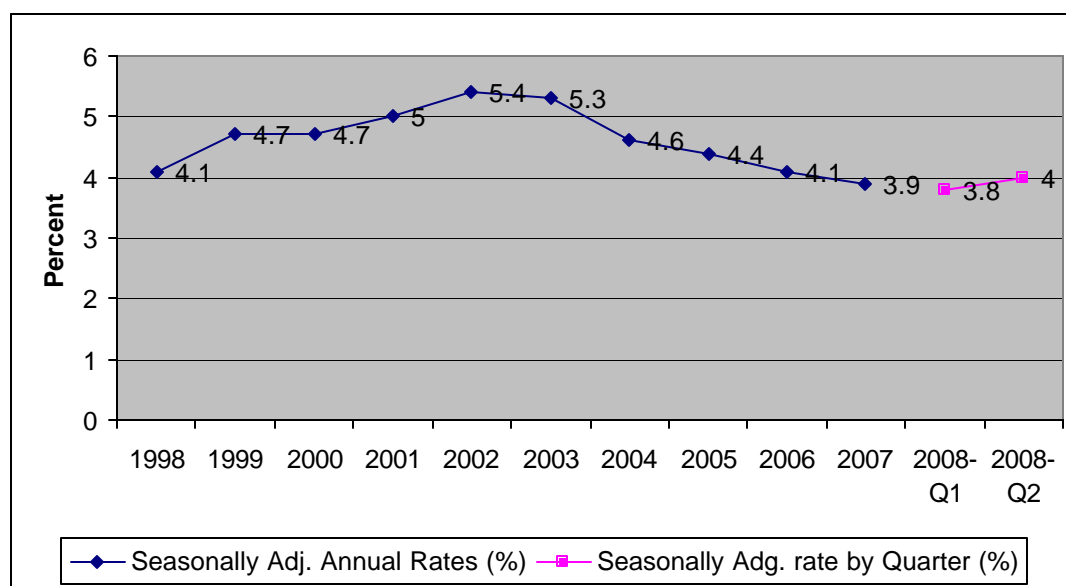
Sources: MAFF Japan

Chart 6. Japan's Population Growth and Expected Decline



Source: National Institute of Population and Social Security Research.

Chart 7. Japanese Unemployment Rate 1998-2008



Source: Ministry of Internal Affairs and Communication

**Appendix A. Japanese Retailers**

\*2007 Average Exchange Rate of ¥117.93 is used for both Appendix A and B

**Table A-1: Top 10 Supermarkets (2007)**

Rank	Company Name	Sales US\$ bil.	No. of Outlets	Location	Telephone/Fax URL	Address
1	Aeon <sup>1</sup>	43.82	569	Nationwide	Tel: 81(0)43-212-6000 Fax: 81(0)43-212-6849 <a href="http://www.aeon.info">www.aeon.info</a>	1-5-1 Nakase, Mihama-ku, Chiba 261-8515
2	Ito-Yokado	12.63	179	Nationwide	Tel: 81(0)3-3459-2111 Fax: 81(0)3-3459-6873 <a href="http://www.itoyokado.co.jp/">http://www.itoyokado.co.jp/</a>	4-1-4 Shiba-Koen Minato-ku, Tokyo 105-8571
3	Uny	10.31	229	Nationwide	Tel: 81(0)587-24-8111 Fax: 81(0)587-24-8024 <a href="http://www.uny.co.jp">www.uny.co.jp</a>	1 Amaike-Gotandacho, Inazawa, Aichi 492-8680
4	Daiei	10.14	207	Nationwide	Tel: 81(0)3-3433-3211 Fax: 81(0)3-5968-6732 <a href="http://www.daiei.co.jp">www.daiei.co.jp</a>	2-4-1 Shibakoen, Minato-ku, Tokyo 105-8514
5	Seiyu	8.37	392	Nationwide	Tel: 81(0)3-3598-7000 Fax: 81(0)3-3598-7763 <a href="http://www.seiyu.co.jp">www.seiyu.co.jp</a>	2-1-1 Akabane, Kita-ku, Tokyo 115-0045
6	Izumi	3.99	72	Kinki, Chugoku	Tel: 81(0)82-264-3211 Fax: 81(0)82-26-5895 <a href="http://www.izumi.co.jp">www.izumi.co.jp</a>	2-22, Kyobashi-cho, Minami-ku Hiroshima-shi, Hiroshima 732-0828
7	Life Corp.	3.73	201	Nationwide	Tel: 81(0)6-6815-2600 <a href="http://www.lifecorp.jp">www.lifecorp.jp</a>	1-19-4 Higashi Nakajima Osakashi, Higashiyodogawa-ku 533-8558
8	Heiwado	3.57	104	Kinki, Chubu	Tel: 81(0)749-23-3111 Fax: 81(0)749-23-3254 <a href="http://www.from.co.jp/heiwado/">www.from.co.jp/heiwado/</a>	31, Koizumi-cho, Hikone-shi, Shiga 522-0043
9	Izumiyu	3.23	87	Kinki	Tel: 81(0)6-6657-3310 Fax: 81(0)6-6657-3398 <a href="http://www.izumiyu.co.jp">www.izumiyu.co.jp</a>	1-4-4 Hanazono-Minami, Nishinari-ku, Osaka 557-0015
10	Maruetsu	3.05	239	Kanto	Tel: 81(0)3-3590-1110 Fax: 81(0)3-3590-4642 <a href="http://www.maruetsu.co.jp">www.maruetsu.co.jp</a>	5-51-12 Higashi-Ikebukuro, Toshima-ku, Tokyo 170-8401

<sup>1</sup>GMS Total of Aeon group.

Sources: Nikkei Marketing Journal “Retail Sector Ranking 2007” (June 25, 2008), and company annual reports. Sales are shown by connection base.

**Table A-2: Top 10 Department Stores (2007)**

Rank	Company Name	Sales US\$ bil.	*No. of Outlets	Location	Telephone/Fax URL	Address
1	Takashimaya	8.84	20	Nationwide	Tel: 81(0)6-6631-1101 Fax: 81(0)6-6632-5195 <a href="http://www.takashimaya.co.jp">www.takashimaya.co.jp</a>	5-1-5 Namba, Chuo-ku, Osaka 542-8510
2	Isetan	6.66	7	Kanto	Tel: 81(0)3-3352-1111 Fax: 81(0)3-5273-5321 <a href="http://www.isetan.co.jp">www.isetan.co.jp</a>	3-14-1, Shinjyuku, Shinjyuku-ku, Tokyo, 160-8011
3	Mitsukoshi	6.56	15	Nationwide	Tel: 81(0)3-3241-3311 Fax: 81(0)3-3242-4559 <a href="http://www.mitsukoshi.co.jp">www.mitsukoshi.co.jp</a>	1-4-1 Nihonbashi-Muromachi, Chuo-ku, Tokyo 103-8001
4	Sogou	4.26	12	Kansai	Tel: 81(0) 66281-3111 <a href="http://www.2.sogo-gogo.com">www.2.sogo-gogo.com</a>	1-8-3 Chuo-ku Shinsaibashisuji Osaka 542-0085

5	Marui	4.18	22	Kanto, Tokai, Kansai	Tel: 81(0)3-3384-0101 Fax: 81(0)3-5343-6615 <a href="http://www.0101.co.jp">www.0101.co.jp</a>	4-3-2 Nakano, Nakano-ku Tokyo 164-8701
6	Daimaru	4.09	12	Nationwide	Tel: 81(0)6-6271-1231 Fax: 81(0)6-6245-1343 <a href="http://www.daimaru.co.jp">www.daimaru.co.jp</a>	1-7-1 Shinsaibashi-Suji, Chuo-ku, Osaka 542-8501
7	Seibu	3.97	16	Kanto, Kinki, Hokkaido	Tel: 81(0)3-3981-0111 <a href="http://www2.seibu.co.jp">www2.seibu.co.jp</a>	1-28-1 Minami Ikebukuro Toshima-ku, Tokyo 171-8569
8	Tokyu	2.62	11	Kanto	Tel: 81(0)3-3477-3111 Fax: 81(0)3-3496-7200 <a href="http://www.tokyu-dept.co.jp">www.tokyu-dept.co.jp</a>	2-24-1 Dogenzaka, Shibuya-ku Tokyo 150-8019
9	Kintetsu	2.55	9	Kinki	Tel: 81(0)6-6624-1111 <a href="http://www.d-kintetsu.co.jp/">www.d-kintetsu.co.jp/</a>	1-1-43 Abenosuji Abeno-ku, Osaka 545-8545
10	Hankyu	2.50	10	Kinki, Kanto	Tel: 81(0)6-6361-1381 Fax: 81(0)6-6486-6048 <a href="http://www.hankyu-dept.co.jp">www.hankyu-dept.co.jp</a>	8-7 Kakuta-cho Kita-ku, Osaka 530-8350

\*Domestic Outlets only.

Sources: Nikkei Marketing Journal "Retail Sector Ranking 2007" (June 25, 2008), and company annual reports. Sales are shown by connection base.

**Table A-3: Top 10 Convenience Stores (2007)**

Rank	Store Name (Parent)	Sales US\$ bil	No. of Outlets	Location	Telephone/Fax URL	Address
1	Seven-Eleven (Ito-Yokado)	21.83	12,034	Nationwide	Tel: 81(0)3-3459-3711 Fax: 81(0)3-3459-6609 <a href="http://www.sej.co.jp">www.sej.co.jp</a>	4-1-4 Shibakoen, Minato-ku, Tokyo 105-0011
2	Lawson (Mitsubishi)	12.00	8,587	Nationwide	Tel: 81(0)3-5476-6800 Fax: 81(0)3-5440-7621 <a href="http://www.lawson.co.jp">www.lawson.co.jp</a>	4-9-25 Shibaura, Minato-ku, Tokyo 108-8563
3	Family Mart (Itochu)	10.17	7,187	Nationwide	Tel: 81(0)3-3989-6600 Fax: 81(0)3-5396-1810 <a href="http://www.family.co.jp">www.family.co.jp</a>	4-26-10 Higashi-Ikebukuro, Toshima-ku, Tokyo 170-8404
4	CircleK Sunkus (Uny)	8.93	6,139	Nationwide	Tel: 81(0)3-5445-3456 Fax: 81(0)3-5445-3466 <a href="http://www.circleksunkus.jp">www.circleksunkus.jp</a>	2-28-2 Shiba, Minato-ku, Tokyo 105-8539
5	Mini-Stop (AEON)	2.59	1,895	Kanto, Tokai, Kinki	Tel: 81(0)3-3294-9749 Fax: 81(0)3-3294-9791 <a href="http://www.ministop.co.jp">www.ministop.co.jp</a>	1-1 Kanda-Nishikicho, Chiyoda-ku, Tokyo 101-0054
6	Daily Yamazaki (Yamazaki)	1.82	1,622	Nationwide	Tel: 81(0)47-323-0001 Fax: 81(0)47-324-0082 <a href="http://www.daily-yamazaki.co.jp">www.daily-yamazaki.co.jp</a>	Sun Plaza 35 Bldg., 1-9-2 Ichikawa, Ichikawa- shi, Chiba 272-8530
7	AM/PM	1.74	1,169	Nationwide	Tel: 81(0)3-5211-3600 Fax: 81(0)3-5211-3593 <a href="http://www.ampm.co.jp">www.ampm.co.jp</a>	13-1 Ichibancho, Chiyoda-ku Tokyo 102-0082
8	Seiko Mart	1.29	1,031	Hokkaido	Tel: 81(0)11-511-2796 Fax: 81(0)11-511-2834 <a href="http://www.seicomart.co.jp">www.seicomart.co.jp</a>	Park 9-5 Bldg., Nishi 6, Minami 9, Chuo-ku, Sapporo 064-8620
9	Ninety-nine Plus, Inc. (Lawson)	1.21	837	Nationwide	Tel: 81(0)42-348-8166 Fax: 81(0)42-343-0536 <a href="http://www.shop99.co.jp">www.shop99.co.jp</a>	1-4-39 Gakuen Higashimachi, Kodaira-shi, Tokyo 187-0043
10	Three F Co., Ltd.	1.00	722	Kanto	Tel: 81(0)45-651-2111 <a href="http://www.three-f.co.jp/">www.three-f.co.jp/</a>	17 Nihon-Odori, Naka-ku Yokohama 231-8507

\*Sales of total shops (owned-store, franchised-store, and area franchised-store).

Sources: Nikkei Marketing Journal "Convenience Store Ranking 2007" (July 23, 2008), and company annual reports. Sales are shown by connection base.

Table A-4: Top 10 Food Wholesalers (2007)

Rank	Company Name	Sales US\$ bil	Location	Telephone/Fax URL	Address
1	Kokubu	12.10	Nationwide	Tel: 81(0)3-3276-4000 Fax: 81(0)3-3271-6523 <a href="http://www.kokubu.co.jp">www.kokubu.co.jp</a>	1-1-1 Nihonbashi, Chuo-ku, Tokyo 103-8241
2	Ryoshoku	11.87	Nationwide	Tel: 81(0)3-3767-5111 Fax: 81(0)3-3767-0424 <a href="http://www.ryoshoku.co.jp">www.ryoshoku.co.jp</a>	6-1-1 Heiwajima, Ota-ku, Tokyo 143-6556
3	Nippon Access	11.38	Nationwide	Tel: 81(0)3-6859-1111 Fax: 81(0)3-3410-4626 <a href="http://www.nippon-access.co.jp">www.nippon-access.co.jp</a>	3-1-3 Ikejiri, Setagaya-ku, Tokyo 154-8501
4	Kato Sangyo	5.10	Nationwide	Tel: 81(0)798-33-7650 Fax: 81(0)798-22-5637 <a href="http://www.katosangyo.co.jp">www.katosangyo.co.jp</a>	9-20, Matsubara-cho, Nishinomiya-shi, Hyogo 662-8543
5	Itochu Foods	4.94	Nationwide	Tel: 81(0)6-6204-5901 Fax: 81(0)6-6204-5970 <a href="http://www.itochu-shokuhin.com">www.itochu-shokuhin.com</a>	2-1-6 Koraibashi, Chuo-ku, Osaka 541-8578
6	Mitsui Shokuhin	4.48	Nationwide	Tel: 81(0)3-3551-1211 Fax: 81(0)3-5541-7467 <a href="http://www.mitsuifoods.co.jp/">http://www.mitsuifoods.co.jp/</a>	1-25-12 Shinkawa, Chuo-ku, Tokyo 104-8286
7	Nihon Shurui Hanbai	4.08	Nationwide	Tel: 81(0)3-3273-1751 Fax: 81(0)3-3242-0457 <a href="http://www.nishuhan.co.jp">www.nishuhan.co.jp</a>	2-2-1 Yazsu, Chuo-ku, Tokyo 104-8466
8	Asahi Shokuhin	3.11	Nationwide	Tel: 81(0) 92- 474- 0711 <a href="http://www.asask.co.jp">www.asask.co.jp</a>	2-15-5 Minami Harimaya-cho Kochishi, Kochi 780-8505
9	Meidi-ya Shoji	3.04	Nationwide	Tel: 81(0)3-3271-1111 Fax: 81(0)3-3273-6360 <a href="http://www.meidi-ya.co.jp">www.meidi-ya.co.jp</a>	2-2-8, Kyobashi, Chuo-ku, Tokyo 104-8302
10	Food Service Network	2.63	Nationwide	Tel: 81(0)3-5652-6300 Fax: 81(0)3-5652-6310 <a href="http://www.fsnltd.co.jp">www.fsnltd.co.jp</a>	3-15-1 Nihonbashi Hamamachi Chuo-ku, Tokyo 103-0007

Sources: Nikkei Marketing Journal "Wholesaler Ranking 2007" (July 30, 2008), and company annual reports. Sales are shown by connection base.

**Appendix B. Japanese Food Service Companies**

\*2007 Average Exchange Rate of ¥117.93 is used for both Appendix A and B

**Table B-1: Top 10 Commercial Restaurant Food Service Companies (2007)**

Rank	Company Name	Sales US\$ bil.	No. of Outlets	Location	Telephone/Fax URL	Address
1	McDonald's Japan	4.19	3,746	Nationwide	Tel: 81(0)3-3344-6251 Fax: 81(0)3-3344-6769 <a href="http://www.mcdonalds.co.jp">www.mcdonalds.co.jp</a>	6-5-1 Nishi-Shinjuku, Shinjuku-ku, Tokyo 163-1339
2	Skylark	2.33	2,573	Nationwide	Tel: 81(0)4-2251-8111 Fax: 81(0)4-2237-5240 <a href="http://www.skylark.co.jp">www.skylark.co.jp</a>	1-25-8 Nishi-Kubo, Musashino-shi, Tokyo 180-8580
3	Nissin Health Care Food Service	1.33	4,100	Nationwide	Tel: 81(0)3-3287-3611 Fax: 81(0)3-3287-3617 <a href="http://www.nifs.co.jp">www.nifs.co.jp</a>	2-7-3 Marunouchi, Chiyoda-ku, Tokyo, 100-6420
4	Plenus	1.32	2,381	Nationwide	Tel: 81(0)92-452-3600 Fax: 81(0)6-6376-8022 <a href="http://www.plenus.co.jp/">www.plenus.co.jp/</a>	1-19-21 Kamimuta, Hakata-ku, Fukuoka 812-8580
5	Kentucky Fried Chicken Japan	1.16	1,503	Nationwide	Tel: 81(0)3-3719-0231 Fax: 81(0)3-5722-7240 <a href="http://www.kfc.co.jp/">http://www.kfc.co.jp/</a>	1-15-1 Ebisu-Minami, Shibuya-ku, Tokyo 150-8586
6	Monterozza	1.06	1,373	Nationwide	Tel: 81(0)422-36-8888 Fax: 81(0)422-36-8988 <a href="http://www.monterozza.co.jp">www.monterozza.co.jp</a>	1-17-3 Nakamachi, Musashino-shi, Tokyo 180-0006
7	Duskin (Mister Donut)	1.06	1,245	Nationwide	Tel: 81(0)6-6821-5006 Fax: 81(0)6-6821-5357 <a href="http://www.duskin.co.jp">www.duskin.co.jp</a>	1-33 Toyotsu-cho, Suita-shi, Osaka 564-0051
8	Reins International	1.05	1,329	Nationwide	Tel: 81(0)3-5775-2001 Fax: 81(0)3-5770-3001 <a href="http://www.reins.co.jp/">www.reins.co.jp/</a>	Roppongi Hills Mori Tower 29F, 6-10-1, Roppongi, Minato-ku, Tokyo 106-6129
9	Honke Kamadoya	0.96	2348	Nationwide	Tel: 81(0)78-251-2308 Fax: 81(0)78-251-3146 <a href="http://www.honkekamadoya.co.jp">www.honkekamadoya.co.jp</a>	1-1-5 Nunobikimachi, Chuo-ku, Kobe, Hyogo 651-0097
10	Zensho	0.89	995	Nationwide	Tel: 81(0)3-5783-8850 <a href="http://www.zensho.co.jp/en/">http://www.zensho.co.jp/en/</a>	JR Shinagawa East Bldg 6F-8F, 2-18-1 Konan, Minato-ku, Tokyo 108-0075

Sources: Nikkei Marketing Journal "Food Service Ranking 2007" (May 14, 2008), and company annual reports. Sales are shown by connection base.



**Table B-2: Top 5 Institutional Food Service Companies (2007)**

Rank	Company Name	Sales US\$ bil.	Location	Telephone/Fax URL	Address
1	Nisshin Healthcare Food Service	1.33	Nationwide	Tel: 81(0)3-3230-2235 Fax: 81(0)3-3237-4923 <a href="http://www.nifs.co.jp">www.nifs.co.jp</a>	Kioicho Bldg. 16F, 3-12 Kioicho, Chiyoda-ku, Tokyo 102-8545
2	Aim Services	0.75	Nationwide	Tel: 81(0)3-3592-3721 Fax: 81(0)3-3502-6580 <a href="http://www.aimservices.co.jp">www.aimservices.co.jp</a>	1-1-15 Nishi-Shimbashi, Minato-ku, Tokyo 105-0003
3	Seiyo Food Compass Group	0.71	Nationwide	Tel: 81(0)3-3984-0281 Fax: 81(0)3-3983-3475 <a href="http://www.seiyofood.co.jp">www.seiyofood.co.jp</a>	3-13-3, Higashi Ikebukuro, Toshima-ku, Tokyo, 170-0013
4	Uokuni Sohonsha	0.52	Nationwide	<a href="http://www.uokuni-s.co.jp/">http://www.uokuni-s.co.jp/</a>	1-6-19, Doshucho, Chuo-ku, Osaka 541-0045
5	Fuji Sangyo	0.49	Nationwide	Tel: 81(0)3-5400-6111 <a href="http://www.fuji-i.com/">http://www.fuji-i.com/</a>	5-32-7 Shinbashi, Minato-ku, Tokyo, 105-0004

Sources: Nikkei Marketing Journal "Food Service Ranking 2007" (May 14, 2008), and company annual reports. Sales are shown by connection base

**Table B-3: Top 5 Home Meal Replacement Sector and Bento Producers/Marketers (2007)**

Rank	Company Name	Sales US\$ bil.	No. of Outlets	Location	Telephone/Fax URL	Address
1	Plenus (Hokka hokka tei)	1.32	2,381	Nationwide	Tel: 81(0)3-3456-6601 Fax: 81(0)3-3456-6644 <a href="http://www.hurxley.co.jp">www.hurxley.co.jp</a>	Sumitomo Shibaura Bldg. 3F, 4-16-36 Shibaura, Minatoku, Tokyo 108-0023
2	Honke Kamadoya	0.96	2,348	Nationwide	Tel: 81(0)78-251-2308 Fax: 81(0)78-251-3146 <a href="http://www.honkekamadoya.co.jp">www.honkekamadoya.co.jp</a>	1-1-5 Nunobikimachi, Chuo-ku, Kobe, Hyogo 651-0097
3	Four Seeds (Pizza-La)	0.48	656	Nationwide	Tel: 81(0)3-3409-6000 Fax: 81(0)3-5466-4400 <a href="http://www.pizza-la.co.jp">www.pizza-la.co.jp</a>	5-12-4 Zenkaren build. 5 <sup>th</sup> floor, Minami Aoyama Minato-ku Tokyo-to, 107-0062
4	Origin Toshu	0.43	595	Nationwide	Tel: 81(0)3-3305-0180 Fax: 81(0)3-3305-0330 <a href="http://www.toshu.co.jp">www.toshu.co.jp</a>	3-2-4 Sengawacho, Chofu, Tokyo 182-0002
5	Rock Field	0.38	311	Nationwide	Tel: 81(0)78-435-2800 Fax: 81(0)78-435-2805 <a href="http://www.rockfield.co.jp/">http://www.rockfield.co.jp/</a>	15-2 Uozakihama-cho, Higashinada-ku, Kobe 658-0024

Sources: Nikkei Marketing Journal "Food Service Ranking 2007" (May 14, 2008), and company annual reports. Sales are shown by connection base

## Appendix C. Japanese Food Manufacturers by Product Category

<b>Table C-1 Frozen Foods</b>		
Company Name	Share %	Main Product
Nichirei	18.9	Fried Rice and Vegetables
Maruha Nichiro Holdings	15.0	Fried Shrimp, frozen noodles
Katokichi	14.4	Seasonings, cooking oils, home use products
Ajinomoto Frozen Foods	12.7	Fisheries products, processed foods
Nippon Suisan Kaisha	7.6	Seafood

<b>Table C-2 Ham &amp; Sausage</b>		
Company Name	Share %	Main Products
Nippon Meat Packers	21.3	Meat
Itoham Foods	20.0	Ham & Sausages
Marudai Food	16.5	Ham, Sausages & Meat
Prima Meat Packers	10.0	Meat
Yonekyu	6.6	Meat Products

<b>Table C-3 Ice cream</b>		
Company Name	Share %	Main Products
Morinaga	13.0	Milk & Yogurt
Haagen-daz	11.8	Ice cream
Ezaki Glico	11.6	Ice cream, snack
Meiji Dairies Corp	10.6	Milk & Yogurt
Lotte	9.4	Ice cream, snack

<b>Table C-4 Pasta</b>		
Company Name	Share %	Main Product
Nisshin Foods	30.5	Flour, microwave pasta
Nippon Flour Mills	24.1	Flour
Showa Sangyo	6.5	Instant Noodles
Hagoromo Foods	6.5	Instant Noodles
Okumoto Flour Milling	3.0	Flour

Sources: "Market Share 2008" published by Nikkei Sangyo Shimbun Publishing

<b>Table C-5 Instant Noodle</b>		
Company Name	Share %	Main Product
Nissin Food Products	39.8	Flour
Toyo Suisan	20.2	Seafood
Sanyo Foods	12.0	Instant Noodles
Myojo Foods	10.8	Instant Noodles
Acecook	7.4	Instant Noodles

<b>Table C-6 Beer</b>		
Company Name	Share %	Main Product
Asahi Breweries	37.9	Beer
Kirin Breweries	37.8	Beer
Sapporo Breweries	12.5	Beer
Suntory	11.0	Spirits, Wine, Beer
Orion Breweries	0.8	Shochu

<b>Table C-7 Soft Drinks</b>		
Company Name	Share %	Main Product
Coca-Cola	29.1	Non-alcoholic drinks
Suntory	19.9	Non-alcoholic drinks
Kirin Beverage	11.0	Non-alcoholic drinks
Ito En	8.8	Green Tea
Asahi Soft Drinks	7.5	Green Tea

<b>Table C-8 Tonic Drinks/Over-the-Counter Preparations</b>		
Company Name	Share %	Main Product
Taisho Pharmaceutical	40.9	Tonic drinks
Sato Pharmaceutical	11.4	Health drinks
Taiho Pharmaceutical	7.7	Amino acid products
Takeda Pharmaceutical	6.8	Tonic drinks
SSP	6.0	Tonic Drinks

Appendix C Sources: Nihon Sangyo Shimbun, Inc. "Domestic Share Survey", 2008 (July 22, 2008) except Table C-4

## Appendix D. Key Contacts

**Table D-1: U.S. Government**

Organization Name	Telephone/Fax URL/E-mail	Address
Agricultural Trade Office American Embassy, Tokyo	Tel: 81(0)3-3505-6050 Fax: 81(0)3-3582-6429 <a href="http://www.usdajapan.org">www.usdajapan.org</a> <a href="mailto:atotokyo@fas.usda.gov">atotokyo@fas.usda.gov</a>	1-10-5 Akasaka Minato-ku, Tokyo 107-8420
Agricultural Trade Office American Consulate-General, Osaka	Tel: 81(0)6-6315-5904 Fax: 81(0)6-6315-5906 <a href="http://www.usdajapan.org">www.usdajapan.org</a> <a href="mailto:atoosaka@fas.usda.gov">atoosaka@fas.usda.gov</a>	2-11-5 Nishi-Tenma Osaka 530-8543
ATO's B-to-B website	<a href="http://myfoodbusiness.jp/">http://myfoodbusiness.jp/</a>	
Agricultural Affairs Office, American Embassy, Tokyo	Tel: 81(0)3-3224-5105 Fax: 81(0)3-3589-0793 <a href="mailto:agtokyo@fas.usda.gov">agtokyo@fas.usda.gov</a>	1-10-5 Akasaka Minato-ku, Tokyo 107-8420
American Embassy Tokyo, Japan	Tel: 81(0)3-3224-5000 Fax: 81(0)3-3505-1862 <a href="http://tokyo.usembassy.gov/">http://tokyo.usembassy.gov/</a>	1-10-5 Akasaka Minato-ku, Tokyo 107-8420
Animal and Plant Health Inspection Service (APHIS)	Tel: 81(0)3-3224-5111 Fax: 81(0)3-3224-5291 <a href="http://www.aphis.usda.gov">www.aphis.usda.gov</a>	1-10-5 Akasaka, Minato-ku, Tokyo 107-8420
FAS Washington	<a href="http://www.fas.usda.gov">www.fas.usda.gov</a>	1400 Independence Ave., SW Washington, DC 20250
USDA Washington	<a href="http://www.usda.gov">www.usda.gov</a>	1400 Independence Ave., SW Washington, DC 20250

**Table D-2: U.S. State Government Offices in Japan**

Organization Name	Telephone/Fax URL	Address
Alabama	Tel: 81(0)3-3655-3508 Fax: 81(0)3-5232-3850 <a href="http://www.ado.state.al.us">www.ado.state.al.us</a>	Minami Aoyama Bldg. 5F, 1-10-2 Minami Aoyama Minato-ku, Tokyo 107-0062
Alaska	Tel: 81(0)3-3556-9621 Fax: 03-3556-9623 <a href="http://www.alaska.or.jp">www.alaska.or.jp</a>	Room 307 Central Bldg. 22-1, Ichibancho Chiyoda-ku, Tokyo 102-0082
Arizona	Tel: 81(0)3-3492-8951 Fax: 81(0)3-3492-8951 <a href="http://www.azcommerce.com/itrade">http://www.azcommerce.com/itrade</a>	2-9-7-414, Nishi-Gotanda Shinagawa-ku, Tokyo 141-0031
Arkansas	Tel: 81(0)3-5447-7471 Fax: 81(0)3-5447-7472 <a href="http://www.arkansas-jp.org">www.arkansas-jp.org</a> <a href="http://arkansasedc.com">http://arkansasedc.com</a>	AIOS Hiroo Bldg. 8F, 1-11-2 Hiroo Shibuya-ku, Tokyo 150-0012
Colorado	Tel: 81(0)3-5272-1041 Fax: 81(0)3-3207-6685 <a href="http://www.ag.state.co.us">www.ag.state.co.us</a>	2-3-26 Nishi-Waseda Shinjuku-ku, Tokyo 169-0051
Delaware	Tel: 81(0)3-3345-7600 Fax: 81(0)3-3347-8180 <a href="http://www.delaware.gov">www.delaware.gov</a>	Shinjuku Sumitomo Bldg. 13F, 2-6-1 Nishi Shinjuku Shinjuku-ku, Tokyo 163-0269
Florida	Tel: 81(0)3-3230-0505 Fax: 81(0)3-5213-0507 <a href="http://www.eflorida.com">www.eflorida.com</a>	Sakamiya #2 Bldg. 5F, 10 Ichibancho Chiyoda-ku, Tokyo 102-0082
Georgia	Tel: 81(0)3-3539-1676 Fax: 81(0)3-3504-8233 <a href="http://www.georgia.org">www.georgia.org</a>	2-7-16 Toranomom, Minato-ku, Tokyo 105-0001
Idaho	Tel: 81(0)7-8854-7270 Fax: 81(0)7-8854-7271 <a href="http://agri.idaho.gov">http://agri.idaho.gov</a>	1521-3-602 Mikage Aza Shironomae, Mikage-cho Higashinada-ku, Kobe 658-0056
Illinois	Tel: 81(0)3-3268-8011 Fax: 81(0)3-3268-8700 <a href="http://www.commerce.state.il.us">www.commerce.state.il.us</a>	2-1 Ichigaya, Ichigaya Sadoharacho Shinjuku-ku, Tokyo 162-0842
Indiana	Tel: 81(0)3-3234-3875 Fax: 81(0)3-3234-3886 <a href="http://www.venture-web.or.jp/indiana/">www.venture-web.or.jp/indiana/</a>	Ichinose Bldg. 5F, 3-5-11, Koji-machi Chiyoda-ku, Tokyo 102-0083

Iowa	Tel: 81(0)3-3222-6901 Fax: 81(0)3-3222-6902 <a href="http://www.iowa.gov">www.iowa.gov</a>	Room 903 Central Bldg, 22-1 Ichibancho Chiyoda-ku, Tokyo 102-0082
Kansas	Tel: 81(0)3-3239-2844 Fax: 81(0)3-3239-2848 <a href="http://www.kansascommerce.com">www.kansascommerce.com</a>	Kioicho WITH Bldg 4F, 3-32 Kioicho Chiyoda-ku, Tokyo 102-0094
Kentucky	Tel: 81(0)3-3582-2334 Fax: 81(0)3-3588-1298 <a href="http://www.kentucky-net.com">www.kentucky-net.com</a>	2-5-8 Akasaka Minato-ku, Tokyo 107-0052
Minnesota	Tel: 81(0)3-5740-3991 Fax: 81(0)3-5740-6433 <a href="http://www.state.mn.us">http://www.state.mn.us</a>	SDI Gotanda Bldg. 4F, 7-3-16 Nishi-Gotanda Shinagawa-ku, Tokyo 141-0031
Mississippi	Tel: 81(0)45-222-2047 Fax: 81(0)45-222-2048 <a href="http://www.mississippi.org">www.mississippi.org</a>	Yokohama World Porters 6F, 2-2-1 Shinko Naka-ku, Yokohama 231-0001
Missouri	Tel: 81(0)3-3586-1496 Fax: 81(0)3-3586-1498 <a href="http://missouridevelopment.org">http://missouridevelopment.org</a>	S-303, Ark Executive Tower, 1-14-5 Akasaka Minato-ku, Tokyo 107-0052
Montana	Tel: 81(0)96-385-0782 Fax: 81(0)96-381-3343 <a href="http://agr.mt.gov">http://agr.mt.gov</a>	6-18-1, Suizenji, Kumamoto 862-8570
North Carolina	Tel: 81(0)3-3435-9301 Fax: 81(0)3-3435-9303 <a href="http://www.nccommerce.com/">http://www.nccommerce.com/</a>	Suzuki Bldg 5F, 3-20-4 Toranomom Minato-ku, Tokyo 105-0001
Ohio	Tel: 81(0)3-3499-2493 Fax: 81(0)3-3499-3109 <a href="http://www.state.oh.us">www.state.oh.us</a>	Minami Aoyama First Bldg. 10F 7-8-1 Minami-Aoyama Minato-ku, Tokyo 107-0063
Oregon	Tel: 81(0)3-3580-8951 Fax: 81(0)3-3580-9071 <a href="http://oregon.gov">http://oregon.gov</a>	Shimbashi Hara Bldg. 3F, 2-10-5 Shimbashi Minato-ku, Tokyo 105-0004
Pennsylvania	Tel: 81(0)3-3505-5107 Fax: 81(0)3-5549-4127 <a href="http://www.pa-japan.org">www.pa-japan.org</a>	KY Bldg 7F, 3-16-14, Roppongi Minato-ku, Tokyo 106-0032
South Carolina	Tel: 81(0)45-227-6385 Fax: 81(0)45-227-6386 <a href="http://www.sc.gov">www.sc.gov</a>	Yokohama World Porters 6F, 2-2-1 Shinko cho Naka-ku, Yokohama 231-0001
Tennessee	Tel: 81(0)45-222-2042 Fax: 81(0)45-222-2043 <a href="http://www.state.tn.us">www.state.tn.us</a>	Yokohama World Porters 6F, 2-2-1 Shinko-cho Naka-ku, Yokohama 231-0001
Texas	Tel: 81(0)3-3400-1352 Fax: 81(0)3-3400-0570 <a href="http://www.state.tx.us">www.state.tx.us</a>	2-5-9 Hiroo Shibuya-ku, Tokyo 150-0012
Virginia	Tel: 81(0)3-5404-3424 Fax: 81(0)3-5404-3401 <a href="http://www.yesvirginia.org">www.yesvirginia.org</a>	Kamiyacho MT Bldg. 14F, 4-3-20 Tranomon Minato-ku, Tokyo 105-0001
Washington	Tel: 81(0)3-3459-0896 Fax: 81(0)3-3459-0897 <a href="http://www.trade.wa.gov">www.trade.wa.gov</a>	5-4-8-301 Toranomom Minato-ku, Tokyo 105-0001
West Virginia	Tel: 81(0)52-953-9798 Fax: 81(0)52-953-9795 <a href="http://www.boc.state.wv.us/">http://www.boc.state.wv.us/</a>	3-24-17 Nishiki Naka-ku, Nagoya 460-0003

Table D-3: U.S. Trade Associations and Cooperator Groups in Japan

<i>Organization Name</i>	<i>Telephone/Fax URL</i>	<i>Address</i>
Alaska Seafood Marketing Institute	Tel: (81-3) 3990-1767 Fax: (81-3) 3990-4725 <a href="http://www.alaskaseafoods.org">www.alaskaseafoods.org</a>	5-5-10-207, Tagara, Nerima-ku Tokyo, 179-0073
Almond Board of California	Tel: (81-3) 4520-5848 Fax: (81-3) 4520-5848 <a href="http://www.almondboard.com/">http://www.almondboard.com/</a>	3-5-27 Roppongi, Minato-ku Tokyo 106-0032
American Forest & Paper Association	Tel: (81-3)3568-7450 Fax: (81-3)3568-0720 <a href="http://www.americanwood.jp">http://www.americanwood.jp</a>	No. 9 Kowa Building Annex 1F 1-6-7 Akasaka, Minato-ku, Tokyo 107-0052
American Hardwood Export Council	Tel: (81-6)6315-5101 Fax: (81-6)6315-5103 <a href="http://www.ahec-japan.org/">http://www.ahec-japan.org/</a>	c/o American Consulate General 10F. 2-11-5, Nishitenma, Kita-ku, Osaka 530-8543
American Softwood Japan Office	Tel: (03) 3568-7452 Fax: (03) 3568-0720 <a href="http://www.softwood.org">http://www.softwood.org</a>	No. 9 Kowa Building Annex 1F 1-6-7 Akasaka, Minato-ku, Tokyo 107-0052
American Soybean Association	Tel: (81-3) 5563-1414 Fax: (81-3) 5563-1415 <a href="http://www.asajapan.org/">http://www.asajapan.org/</a>	KY Tameike Bldg., 4F 1-6-19 Akasaka Minato-ku, Tokyo 107-0052
Blue Diamond Growers	Tel: (81-3) 3506-8877 Fax: (81-3) 3506-8883 <a href="http://www.bluediamond.com">www.bluediamond.com</a>	Toranomon NS Bldg 3F, 1-22-15 Toranomon Minato-ku, Tokyo 105-0001
California Cherry Advisory Board	Tel: (81-45) 641-3111 Fax: (81-45) 663-1646 <a href="http://www.calcherry.com">www.calcherry.com</a>	Toshin Bldg. 9B, 4-17 Kaigandori Naka-ku, Yokohama, Kanagawa 231-0005
California Fig Advisory Board	Tel: (81-3) 5766-2753 Fax: (81-3) 5766-2738 <a href="http://www.californiafigs.com">www.californiafigs.com</a>	Takushin Bldg, Honkan 7F, 3-27-11, Shibuya-ku, Tokyo 105-0002
California Nectarine & Fresh Prune Commission	Tel: (81-45) 641-3111 Fax: (81-45) 663-1646 <a href="http://www.caltreefruit.com">www.caltreefruit.com</a>	Toshin Bldg. 9B, 4-17 Kaigandori Naka-ku, Yokohama, Kanagawa 231-0005
California Pistachio Commission	Tel: (81-3) 3403-8288 Fax: (81-3) 3403-8289 <a href="http://www.pistachios.org">www.pistachios.org</a>	9-6-28-702 Akasaka Minato-ku, Tokyo 107-0052
California Prune Board	Tel: (81-3) 3584-0866 Fax: (81-3) 3505-6353 <a href="http://www.californiadriedplums.org">www.californiadriedplums.org</a>	Pacific Bldg.3F, 1-5-3 Higashiazabu Minato-ku, Tokyo 106-0044
California Strawberry Commission	Tel: (81-3) 5770-7533 Fax: (81-3) 5413-7321 <a href="http://www.calstrawberry.com">www.calstrawberry.com</a>	Moto Akasaka Bldg, 9F, 1-7-10 Moto Akasaka Minato-ku, Tokyo 107-0051
California Table Grape Commission	Tel: (81-3) 3221-6410 Fax: (81-3) 3221-5960 <a href="http://www.tablegrape.com">www.tablegrape.com</a>	Seibunkan Bldg, 5F, 5-9, Iidabashi, 1-chome, Chiyoda-ku Tokyo, 102-0072
California Walnut Commission	Tel: (81-3) 3588-1454 Fax: (81-3) 3505-6353 <a href="http://www.walnuts.org">www.walnuts.org</a>	Pacific Bldg.3F, 1-5-3 Higashiazabu Minato-ku, Tokyo 106-0044
Cherry Marketing Institute	Tel: (81-3) 5770-7533 Fax: (81-3) 5413-7321 <a href="http://www.choosecherries.com/">http://www.choosecherries.com/</a>	9F Moto Akasaka Bldg, 1-7-10 Moto Akasaka Minato-ku, Tokyo 107-0051
Cotton Promotion Institute, Japan	Tel: (06) 6231-2665 Fax: (06) 6231-4661 <a href="http://www.cotton.or.jp/">http://www.cotton.or.jp/</a>	Mengyo Kaikan 5-8, Bingomachi 2-Chome, Chuo-ku, Osaka 541-0051
Cranberry Marketing Committee	Tel: (81-3) 3403-8288 Fax: (81-3) 3403-8289 <a href="http://www.uscranberries.com">www.uscranberries.com</a>	9-6-28-702 Akasaka Minato-ku, Tokyo 107-0052

Dairy Export Council, U.S.	Tel: (81-3) 3221-6410 Fax: (81-3) 3221-5960 <a href="http://www.usdec.org">www.usdec.org</a>	Seibunkan Bldg, 5F, 5-9, Iidabashi, 1-chome, Chiyoda-ku Tokyo, 102-0072
Dry Pea & Lentil Council, USA	Tel: (81-3) 3288-0282 Fax: (81-3) 3288-0283 <a href="http://www.pea-lentil.com/">http://www.pea-lentil.com/</a>	3-3-17 Kudan Minami Chiyoda-ku, Tokyo 102-0074
Florida Department of Citrus	Tel: (81-3) 3584-7019 Fax: (81-3) 3582-5076 <a href="http://www.floridajuice.com">www.floridajuice.com</a>	Suite 310, 1-11-36 Akasaka Minato-ku, Tokyo 107-0052
Grains Council, U.S.	Tel: (81-3) 3505-0601 Fax: (81-3) 3505-0670 <a href="http://www.grains.org">www.grains.org</a>	KY Tameike Bldg., 4F, 1-6-19 Akasaka Minato-ku, Tokyo 107-0052
Hawaii Papaya Industry Association	Tel: (81-6) 4560-6031 Fax: (81-6) 4560-6039 <a href="http://www.hawaiipapaya.com/">http://www.hawaiipapaya.com/</a>	Nakanoshima Central Tower, 2-2-7 Nakanoshima Kita-ku, Osaka 530-0005
Idaho Potato Commission	Tel: (81-3) 5766-2753 Fax: (81-3) 5766-2738 <a href="http://www.idahopotatoes.com">www.idahopotatoes.com</a>	Takushin Bldg, Honkan 7F, 3-27-11, Shibuya-ku, Tokyo 105-0002
Meat Export Federation, U.S.	Tel: (81-3) 3584-3911 Fax: (81-3) 3587-0078 <a href="http://www.americanmeat.jp">www.americanmeat.jp</a>	KY Tameike Bldg., 5F, 1-6-19 Akasaka Minato-ku, Tokyo 107-0052
Food Export Association of the Midwest USA (formerly MIATCO)	Tel: (03) 3221-6410 Fax: (03) 3221-5960 <a href="http://www.miatco.org/">http://www.miatco.org/</a>	Seibunkan Bldg. 5F, 5-9, Iidabashi 1-chome Chiyoda-ku, Tokyo 102-0072
Napa Valley Vintners	Tel: (03) 3221-6410 Fax: (03) 3221-5960 <a href="http://www.napavintners.com/">www.napavintners.com/</a>	Seibunkan Bldg. 5F, 5-9, Iidabashi 1-chome Chiyoda-ku, Tokyo 102-0072
National Dry Bean Council	Tel: (81-3) 3221-6410 Fax: (81-3) 3221-5960 <a href="http://www.usdrybeans.com">www.usdrybeans.com</a>	Seibunkan Bldg. 5F, 1-5-9 Iidabashi Chiyoda-ku, Tokyo 102-0072
National Honey Board	Tel: (81-3) 5766-2753 Fax: (81-3) 5766-2738 <a href="http://www.honey.com">www.honey.com</a> , <a href="http://www.nhb.jp/">www.nhb.jp/</a>	Takushin Bldg, Honkan 7F, 3-27-11, Shibuya-ku, Tokyo 105-0002
Northwest Cherry Growers	Tel: (81-3) 5770-7533 Fax: (81-3) 5413-7321 <a href="http://www.nwcherries.com">www.nwcherries.com</a>	Moto Akasaka Bldg, 9F, 1-7-10 Moto Akasaka Minato-ku, Tokyo 107-0051
Oregon Wine Board	Tel: (81-3) 3266-9978 Fax: (81-3) 3266-9299 <a href="http://oregonwine.org/">http://oregonwine.org/</a>	291-1-502 Yamabuki-cho Shinjuku-ku, Tokyo 162-0801
Pet Food Institute	Tel: (81-3) 5789-5398 Fax: (81-3) 5789-5399 <a href="http://www.petfoodinstitute.org">www.petfoodinstitute.org</a>	Yebisu Garden Place Tower, 18F, 4-20-3 Yebisu Shibuya-ku, Tokyo 150-6018
Potato Board, U.S.	Tel: (81-3) 3505-5737 Fax: (81-3) 3505-6353 <a href="http://www.potatoesusa-japan.com">www.potatoesusa-japan.com</a>	Pacific Bldg. 3F, 1-5-3 Higashiazabu Minato-ku, Tokyo 106-0044
Poultry and Egg Export Council, USA	Tel: (81-3) 3403-8288 Fax: (81-3) 3403-8289 <a href="http://www.usapeec.org">www.usapeec.org</a>	9-6-28-702 Akasaka Minato-ku, Tokyo 107-0052
Raisin Administrative Committee	Tel: (81-3) 3221-6410 Fax: (81-3) 3221-5960 <a href="http://www.raisins-jp.org">www.raisins-jp.org</a>	Seibunkan Bldg. 5F, 1-5-9 Iidabashi Chiyoda-ku, Tokyo 102-0072
Rice Federation, USA	Tel: (81-3) 3505-5752 Fax: (81-3) 3505-6353 <a href="http://www.usarice.com">www.usarice.com</a>	Pacific Bldg. 3F, 1-5-3 Higashiazabu Minato-ku, Tokyo 106-0044
Sunkist Pacific Ltd.	Tel: (81-3) 3523-0717 Fax: (81-3) 3523-0710 <a href="http://www.sunkist.com">www.sunkist.com</a>	New River Tower, 8F, 1-6-11, Shinkawa, Tyuo-ku, 104-0033

Washington State Fruit Commission	Tel: (81-3) 5770-7533 Fax: (81-3) 5413-7321 <a href="http://www.nwcherries.com/index.html">http://www.nwcherries.com/index.html</a>	Moto Akasaka Bldg, 9F, 1-7-10 Moto Akasaka Minato-ku, Tokyo 107-0051
Washington Wine Commission	Tel & Fax: (81-3) 6276-5858 <a href="http://www.washingtonwine.org/">http://www.washingtonwine.org/</a>	2-6-11-1507 Shibaura Minato-ku, Tokyo 108-0023
Western Growers Association	Tel: (81-3) 5524-0300 Fax: (81-3) 5524-1102 <a href="http://www.wga.com">www.wga.com</a>	Nihon Kochiku Bldg., 6F. 2-9-12 Kyobashi, Chuo-ku, Tokyo 104-0031
Wheat Associates, U.S.	Tel: (81-3) 3582-7911 Fax: (81-3) 3582-7915 <a href="http://www.uswheat.org">www.uswheat.org</a>	Toshin Tameike Bldg. 5F, 1-1-14 Akasaka Minato-ku, Tokyo 107-0052
Wild Blueberry Association of North America	Tel: (81-3) 5766-2753 Fax: (81-3) 5766-2738 <a href="http://www.wildblueberries.com">www.wildblueberries.com</a>	Takushin Bldg, Honkan 7F, 3-27-11, Shibuya-ku, Tokyo 105-0002
Wine Institute of California	Tel: (81-3) 3707-8960 Fax: (81-3) 3707-8961 <a href="http://www.wineinstitute.org">www.wineinstitute.org</a>	2-24-6-403 Tamagawa Setagaya-ku, Tokyo 158-0094

**Table D-4: U.S. Laboratories Approved by the Japanese Government\***

Organization Name	Telephone/Fax URL	Address
California Export Laboratory Services, California Department of Food and Agriculture, Center for Analytical Chemistry	Tel: 916-262-1434 Fax: 916-262-1572 <a href="http://www.cdffa.ca.gov/is/cac/">www.cdffa.ca.gov/is/cac/</a>	3292 Meadowview Rd. Sacramento, CA 95832
Oregon Department of Agriculture, Export Service Center	Tel: 503-872-6630 Fax: 503-872-6615 <a href="http://oregon.gov/ODA/">http://oregon.gov/ODA/</a>	1207 NW Naito Prkway #224 Portland, OR 97209-2851
ABC Research Corporation	Tel: 904-372-0436 Fax: 904-378-6483 <a href="http://www.abcr.com">www.abcr.com</a>	3437 SW 24 <sup>th</sup> Ave. Gainesville, FL 32602
ACTS Testing Labs Bureau Veritas Group	Tel: 716-505-3300 Fax: 716-505-3301 <a href="http://www.hkexporter.net/inspection/in002.html">http://www.hkexporter.net/inspection/in002.html</a>	100 Northpoint Parkway Buffalo, NY 14228-1884
American Council for Food Safety & Quality / DFA of California		1855 South Van Ness Ave. Fresno, CA 93721
ANRESCO, Inc.	Tel: 415-822-1100 Fax: 415-822-6615 <a href="http://www.anresco.com">www.anresco.com</a>	1370 Van Dyke Ave. San Francisco, CA 94124-3313
Bolin Laboratories, Inc.	Tel: 602-942-8220 Fax: 602-942-1050	17631 N. 25 <sup>th</sup> Ave. Phoenix, AZ 85023
Cargill Analytical Services Laboratory	Tel: 417-451-5973 Fax: 417-451-5478 <a href="http://www.cargill.com">www.cargill.com</a>	Crowder Industrial Park, 4301 Doniphane Dr. Neosho, MO 64850
Certified Laboratories, Inc.	Tel: 516-576-1400 Fax: 516-576-1410 <a href="http://www.800certlab.com/">www.800certlab.com/</a>	200 Express Street, Plainview, NY 11803
Certified Laboratories of California, Inc.		1156 N. Fountain Way #D, Anaheim, CA 92806



Columbia Food Laboratories, Inc.	Tel: 503-695-2287 Fax: 503-695-5187 <a href="http://www.columbiafoodlab.com">www.columbiafoodlab.com</a>	36740 E. Historic Columbia River Hwy. P.O. Box 353 Corbett, OR 97019
Covance Laboratory	Tel: 888-268-2623 Fax: 608-241-7227 <a href="http://www.covance.com/analytical">www.covance.com/analytical</a>	3301 kinsman Blvd. Madison, WI 53704
Eurofins Central Analytical Laboratories	Tel: 504-297-3400 Fax: 504-297-3410 <a href="http://www.centralanalytical.com">www.centralanalytical.com</a>	2315 N. Causeway Blvd., Suite 150 Metairie, LA 70001
Environmental Micro Analysis, Inc.		40 N. East St., Suite B Woodland, CA 95776
Food Products Laboratory, Inc. Bodycote Testing Group	Tel: 503-253-9136 Fax: 503-253-9019 <a href="http://www.bodycotetesting.com/home.aspx?lang=1">http://www.bodycotetesting.com/home.aspx?lang=1</a>	12003 NE Ainsworth Cir., Suite 105 Portland, OR 97220-1099
Irvine Analytical Laboratories, Inc.	Tel: 714-951-4425 Fax: 714-951-4909	10 Vanderbilt Dr. Irvine, CA 92618
Midwest Research Institute	Tel: 816-753-7600 Fax: 816-753-8420 <a href="http://www.mriresearch.org">www.mriresearch.org</a>	425 Volker Blvd. Kansas City, MO 64110-2299
Michelson Laboratories	Tel: 562-928-0553 Fax: 562-927-6625 <a href="http://www.michelsonlab.com">www.michelsonlab.com</a>	6280 Chalet Dr. Commerce, CA 90040-3761
Microbac Laboratories, Inc.	Tel: 909-734-9600 Fax: 909-734-2803 <a href="http://www.microbac.com">www.microbac.com</a>	280 North Smith Ave Corona, CA 91720
NP Analytical Laboratories	Tel: 314-982-1310 Fax: 314-982-1078 <a href="http://www.npal.com/">http://www.npal.com/</a>	Checkerboard Square St. Louis, MO 63164
The National Food Laboratory, Inc.	Tel: 925-828-1440 Fax: 925-933-9239 <a href="http://www.thenfl.com">www.thenfl.com</a>	6363 Clark Ave. Dublin, CA 94568-3097
OMIC USA, Inc.	Tel: 503-223-1497 Fax: 503-223-9436 <a href="http://www.omicusa.com">www.omicusa.com</a>	3344 NW Industrial Street Portland, OR 97210-1619
Primus Laboratories	Tel: 805-922-0055 Fax: 805-922-2462 <a href="http://www.primuslabs.com">www.primuslabs.com</a>	2810 Industrial Parkway Santa Maria, CA 93455
Silliker Laboratories of Illinois, Inc.	Tel: 708-957-7878 Fax: 708-957-8449 <a href="http://www.silliker.com">www.silliker.com</a>	1304 S Halsted St. Chicago Heights, IL 60411-2728
West Coast Food Center, Inc.	Tel: 503-254-5143 Fax: 503-254-1452 <a href="http://www.wcfc.com">www.wcfc.com</a>	12423 NE Whitaker Way Portland, OR 97230

\*Also found on Ministry of Agriculture website: <http://www.mhlw.go.jp/topics/yunyu/5/dl/a3.pdf>

**Table D-5: Japanese Government**

Organization Name	Telephone/Fax URL	Address
Japan External Trade Organization (JETRO)	Tel: 81(0)3-3582-5511 <a href="http://www.jetro.go.jp">www.jetro.go.jp</a>	Ark Mori Building, 6F 12-32, Akasaka 1-chome, Minato-ku, Tokyo 107-6006
Min. of Agriculture, Forestry and Fisheries	Tel: 81(0)3-3502-8111 <a href="http://www.maff.go.jp">www.maff.go.jp</a>	1-2-1 Kasumigaseki Chiyoda-ku, Tokyo 100-8950
Ministry of Health, Labor and Welfare	Tel: 81(0)3-5253-1111 <a href="http://www.mhlw.go.jp">www.mhlw.go.jp</a>	1-2-2 Kasumigaseki Chiyoda-ku, Tokyo 100-8916
Zen-noh (JA)	Tel: 81(0)3-3245-7854 Fax: 81(0)3-3245-7444 <a href="http://www.zennoh.or.jp">www.zennoh.or.jp</a>	1-8-3 Otemachi Chiyoda-ku, Tokyo 100-004
JETRO Atlanta	Tel: 404-681-0600 Fax: 404-681-0713 <a href="http://www.jetro.org/atlanta/">www.jetro.org/atlanta/</a>	245 Peachtree Center Avenue NE, Marquis One Tower Suite 2208, Atlanta, GA 30303
JETRO Chicago	Tel: 312-832-6000 Fax: 312-832-6066 <a href="http://www.jetro.org">www.jetro.org</a>	One East Wacker Drive, Suite 600 Chicago, Illinois 60601
JETRO Houston	Tel: 713-759-9595 Fax: 713-759-9210 <a href="http://www.jetro.org">www.jetro.org</a>	1221 McKinney Street, Suite 4141 Houston, TX 77010
JETRO Los Angeles	Tel: 213-624-8855 Fax: 213-629-8127 <a href="http://www.jetro.org">www.jetro.org</a>	777 South Figueroa Street, Suite 2650 Los Angeles, CA 90017
JETRO New York	Tel: 212-997-0400 Fax: 212-997-0464 <a href="http://www.jetro.org">www.jetro.org</a>	1221 Avenue of the Americas McGraw Hill Bldg. 42 <sup>nd</sup> Floor New York, NY 10020-1079
JETRO San Francisco	Tel: 415-392-1333 Fax: 415-788-6927 <a href="http://www.jetro.org">www.jetro.org</a>	201 Third St. Suite 1010 San Francisco CA 94103

**Table D-6: Japanese Associations - Food**

Organization Name	Telephone/Fax URL	Address
All Japan Confectionery Assoc.	Tel: 81(0)3-3432-3871 Fax: 81(0)3-3432-4081 <a href="http://www.pcg.or.jp">http://www.pcg.or.jp</a>	1-16-10 Shiba Daimon Minato-ku, Tokyo 105-0012
Japan Federation of Dry Noodle Manufactures Assoc.	Tel: 81(0)3-3666-7900 Fax: 81(0)3-3669-7662 <a href="http://www.kanmen.com">www.kanmen.com</a>	15-6 Nihonbashi Kabutocho Chuo-ku, Tokyo 103-0026
Japan Pasta Assoc.	Tel: 81(0)3-3667-4245 Fax: 81(0)3-3667-4245 <a href="http://www.pasta.or.jp">www.pasta.or.jp</a>	15-6 Nihonbashi Kabutocho Chuo-ku, Tokyo 103-0026
All Nippon Spice Assoc.	Tel: 81(0)3-3237-9360 Fax: 81(0)3-3237-9360 <a href="http://www.ansa-spice.com">www.ansa-spice.com</a>	Sankyo Main Bldg. #505, 1-7-10 Iidabashi Chiyoda-ku, Tokyo 102-0072
Chocolate & Cocoa Assoc. of Japan	Tel: 81(0)3-5777-2035 Fax: 81(0)3-3432-8852 <a href="http://www.chocolate-cocoa.com">www.chocolate-cocoa.com</a>	JB Bldg., 6-9-5 Shimbashi Minato-ku, Tokyo 105-0004
Japan Baking Industry Assoc.	Tel: 81(0)3-3667-1976 Fax: 81(0)3-3667-2049 <a href="http://www.fsic.co.jp/food/pan">www.fsic.co.jp/food/pan</a>	Yaesu Kato Bldg. 5F, 15-12 Nihonbashi Kabutocho Chuo-ku, Tokyo 103-0026

Japan Bento Manufacturers Assoc.	Tel: 81(0)3-3356-1575 Fax: 81(0)3-3356-1817 <a href="http://www.bentou-shinkou.or.jp">www.bentou-shinkou.or.jp</a>	Shinichi Bldg. 10F, 2-8 Yotsuya Shinjuku-ku, Tokyo 160-0004
Japan Canners Assoc.	Tel: 81(0)3-3213-4751 Fax: 81(0)3-3211-1430 <a href="http://www.jca-can.or.jp">www.jca-can.or.jp</a>	Yurakucho Denki Bldg, 1-7-1 Yurakucho Chiyoda-ku, Tokyo 100-0006
Japan Dairy Industry Assoc.	Tel: 81(0)3-3261-9161 Fax: 81(0)3-3261-9175 <a href="http://www.jdia.or.jp">www.jdia.or.jp</a>	1-14-19 Kudan Kita Chiyoda-ku, Tokyo 102-0073
Japan Dry Fruits Importers Assoc.	Tel: 81(0)3-3242-8316 Fax: 81(0)3-3242-8521	c/o Toyota Tsusho Corporation, Food Dept. Confectionary Ingredient Group, 3-8-1 Marunouchi, Chiyoda-ku, Tokyo 100-8320
Japan Freeze Dry Food Industry Assoc.	Tel: 81(0)3-3432-4664 Fax: 81(0)3-3459-4654	c/o Nihon Shokuryo Shimbin 1-9-9 Yaesu, Chuo-ku, Tokyo 103-0028
Japan Frozen Foods Assoc.	Tel: 81(0)3-3667-6671 Fax: 81(0)3-3669-2117 <a href="http://www.reishokukyo.or.jp">www.reishokukyo.or.jp</a>	10-6 Nihonbashi-Kobunacho Chuo-ku, Tokyo 103-0024
Japan Grain Importers Assoc.	Tel: 81(0)3-3431-3895 Fax: 81(0)3-3431-3882	2-39-8, Nishishinbashi Minato-ku, Tokyo 105-0003
Japan Ham & Sausage Processors Assoc.	Tel: 81(0)3-3444-1211 Fax: 81(0)3-3441-8287 <a href="http://group.lin.go.jp/hamukumi/">http://group.lin.go.jp/hamukumi/</a>	1-5-6 Ebisu Shibuya-ku, Tokyo 150-0013
Japan Health Food and Nutrition Assoc.	Tel: 81(0)3-3268-3134 Fax: 81(0)3-3268-3136 <a href="http://www.jhnfa.org/">http://www.jhnfa.org/</a>	2-7-27 Ichigaya Sadoharacho Shinjuku-ku, Tokyo 162-0842
Japan Honey Assoc.	Tel: 81(0)3-3297-5645 Fax: 81(0)3-3297-5646 <a href="http://bee.lin.go.jp/">http://bee.lin.go.jp/</a>	Bajichikusan Kaikan, 2-6-16-Shinkawa, Chuo-ku Tokyo 104-0033
Japan Ice Cream Assoc.	Tel: 81(0)3-3264-3104 Fax: 81(0)3-3230-1354 <a href="http://www.icecream.or.jp">www.icecream.or.jp</a>	1-14-19 Kudan Kita Chiyoda-ku, Tokyo 102-0073
Japan Fish Traders Assoc.	Tel: 81(0)3-5280-2891 Fax: 81(0)3-5280-2892 <a href="http://www.jfta.or.jp">www.jfta.or.jp</a>	1-23 Kanda-Nishikicho, Chiyoda-ku, Tokyo 101-0054
Japan Meal Replacement Assoc.	Tel: 81(0)3-3263-0957 Fax: 81(0)3-3263-1325 <a href="http://www.souzai.or.jp">www.souzai.or.jp</a>	Kojimachi Annex 6F, 4-5-10 Kojimachi Chiyoda-ku, Tokyo 102-0083
Japan Meat Traders Assoc.	Tel: 81(0)3-3588-1665 Fax: 81(0)3-3588-0013	Daini Watanabe Bldg., 1-7-3 Higashi Azabu Minato-ku, Tokyo 106-0044
Japan Nut Association	Tel: 81(0)3-6662-6527 Fax: 81(0)3-6662-6528 <a href="http://www.jna-nut.com/">http://www.jna-nut.com/</a>	Kohinata Bldg. #203, 2-18-10 Shinkawa Chuo-ku Tokyo 104-0033
Japan Peanuts Assoc.	Tel: 81(0)3-3584-7311 <a href="http://www.peanuts-jp.com/">http://www.peanuts-jp.com/</a>	1-9-13, Akasaka Minatoku, Tokyo 107-0052
Japan Poultry Assoc./Japan Egg Producers Assoc.	Tel: 81(0)3-3297-5515 Fax: 81(0)3-3297-5519 <a href="http://www.jpa.or.jp/">http://www.jpa.or.jp/</a>	Bajichikusan-kaikan, 2-6-16 Shinkawa Chuo-ku, Tokyo 104-0033
Japan Processed Tomato Industry Assoc.	Tel: 81(0)3-3639-9666 Fax: 81(0)3-3639-9669 <a href="http://www.japan-tomato.or.jp">www.japan-tomato.or.jp</a>	15-18 Nihonbashi- Kodenmacho Chuo-ku, Tokyo 103-0001
Japan Snack Cereal Foods Assoc.	Tel: 81(0)3-3902-8877 Fax: 81(0)3-3902-9131 <a href="http://jasca.jp/">http://jasca.jp/</a>	c/o Calbee, 1-20-1 Akabane Minami Kita-ku, Tokyo 115-0044

Japan Sauce Industry Assoc.	Tel: 81(0)3-3639-9667 Fax: 81(0)3-3639-9669 <a href="http://www.nippon-sauce.or.jp">www.nippon-sauce.or.jp</a>	15-18 Nihonbashi- Kodenmacho Chuo-ku, Tokyo 103-0001
Japan Soba Noodle Assoc.	Tel: 81(0)3-3264-3801 Fax: 81(0)3-3264-3802 <a href="http://www.nihon-soba-kyoukai.or.jp/">http://www.nihon-soba-kyoukai.or.jp/</a>	2-4 Kanda Jinbocho Chiyoda-ku, Tokyo 101-8420
Japan Swine Association	Tel: 81(0)3-3370-5473 Fax: 81(0)3-3370-7937 <a href="http://pig.lin.go.jp/">http://pig.lin.go.jp/</a>	1-37-20, Yoyogi Shibuya-ku, Tokyo 151-0053

**Table D-7: Japanese Associations - Beverages**

Organization Name	Telephone/Fax URL	Address
All Japan Coffee Assoc.	Tel: 81(0)3-5649-8377 Fax: 81(0)3-5649-8388 <a href="http://coffee.ajca.or.jp">http://coffee.ajca.or.jp</a>	Max Bldg., 6-2 Nihonbashi Hakozaicho Chuo-ku, Tokyo 103-0015
Brewers Association of Japan	Tel: 81(0)3-3561-8386 Fax: 81(0)3-3561-8380 <a href="http://www.brewers.or.jp">www.brewers.or.jp</a>	Showa Bldg., 2-8-18 Kyobashi Chuo-ku, Tokyo 104-0031
The Mineral Water Assoc. of Japan	Tel: 81(0)3-3350-9100 Fax: 81(0)3-3350-7960 <a href="http://www.minekyo.jp">www.minekyo.jp</a>	Shinjuku Mura Bldg 4F, 1-28-4, Shinjuku Shinjuku-ku, Tokyo 160-0022
Japan Soft Drinks Assoc.	Tel: 81(0)3-3270-7300 Fax: 81(0)3-3270-7306 <a href="http://www.j-sda.or.jp">www.j-sda.or.jp</a>	3-3-3 Nihonbashi- Muromachi Chuo-ku, Tokyo 103-0022
Japan Spirits & Liquors Makers Assoc.	Tel: 81(0)3-6202-5728 Fax: 81(0)3-6202-5738 <a href="http://www.yoshu.or.jp/">http://www.yoshu.or.jp/</a>	2-12-7, Nihonbashi Chuo-ku, Tokyo 103-0025
Japan Wines & Spirits Importers Assoc.	Tel: 81(0)3-3503-6505 Fax: 81(0)3-3503-6504 <a href="http://www.youshu-yunyu.org/">http://www.youshu-yunyu.org/</a>	1-13-5 Toranomon Minato-ku, Tokyo 105-0001
Japan Wineries Assoc.	Tel: 81(0)3-6202-5728 Fax: 81(0)3-6202-5738 <a href="http://www.winery.or.jp/">http://www.winery.or.jp/</a>	Takeda Shinedobashi Bldg 2F, 2-12-7 Nihonbashi Chuo-ku, Tokyo 103-0027

**Table D-8: Japanese Associations - Distribution**

Organization Name	Telephone/Fax URL	Address
National Assoc. of Supermrkets	Tel: 81(0)3-3207-3157 Fax: 81(0)3-3207-5277 <a href="http://www.super.or.jp">www.super.or.jp</a>	Okubo Fuji Bldg., 2-7-1 Okubo Shinjuku-ku, Tokyo 169-0072
Japan Chain Store Assoc.	Tel: 81(0)3-5251-4600 Fax: 81(0)3-5251-4601 <a href="http://www.jcsa.gr.jp">www.jcsa.gr.jp</a>	1-21-17 Toranomom Minato-ku, Tokyo 105-0001
Japan Department Store Assoc.	Tel: 81(0)3-3272-1666 Fax: 81(0)3-3281-0381 <a href="http://www.depart.or.jp">www.depart.or.jp</a>	Yanagiya Bldg. 7F, 2-1-10 Nihonbashi Chuo-ku, Tokyo 103-0027
Japan Food Service Assoc.	Tel: 81(0)3-5403-1060 Fax: 81(0)3-5403-1065 <a href="http://www.jfnet.or.jp">www.jfnet.or.jp</a>	1-29-6 Hamamatsucho Minato-ku, Tokyo 105-0013
Japan Food Service Wholesalers Assoc.	Tel: 81(0)3-5296-7723 Fax: 81(0)3-3258-6367 <a href="http://www.gaishokukyo.or.jp">www.gaishokukyo.or.jp</a>	2-16-18 Uchikanda Chiyoda-ku, Tokyo 101-0047
Japan Franchise Assoc.	Tel: 81(0)3-5777-8701 Fax: 81(0)3-5777-8711 <a href="http://jfa.jfa-fc.or.jp/">http://jfa.jfa-fc.or.jp/</a>	Daini Akiyama Bldg., 3-6-2 Toranomom Minato-ku, Tokyo 105-0001
Japan Hotel Assoc.	Tel: 81(0)3-3279-2706 Fax: 81(0)3-3274-5375 <a href="http://www.j-hotel.or.jp">www.j-hotel.or.jp</a>	Shin Otemachi Bldg., 2-2-1 Otemachi Chiyoda-ku, Tokyo 100-0004
Japan Medical Food Service Assoc.	Tel: 81(0)3-5298-4161 Fax: 81(0)3-5298-4162 <a href="http://www.j-mk.or.jp">www.j-mk.or.jp</a>	Forte Kanda. 5F, 1-6-17 Kajicho Chiyoda-ku, Tokyo 101-0044
Japan Processed Foods Wholesalers Assoc.	Tel: 81(0)3-3241-6568 Fax: 81(0)3-3241-1469 <a href="http://homepage3.nifty.com/nsk-nhk/">http://homepage3.nifty.com/nsk-nhk/</a>	Edo Bldg., 4F, 2-5-11 Nihonbashi- Muromachi Chuo-ku, Tokyo 102-0022
Japan Restaurant Assoc.	Tel: 81(0)3-5651-5601 Fax: 81(0)3-5651-5602 <a href="http://www.joy.ne.jp/restaurant">www.joy.ne.jp/restaurant</a>	BM Kabuto Bldg., 11-7 Nihonbashi Kabuto-cho Chuo-ku, Tokyo 103-0026
Japan Retailers Assoc.	Tel: 81(0)3-3283-7920 Fax: 81(0)3-3215-7698 <a href="http://www.japan-retail.or.jp">www.japan-retail.or.jp</a>	3-2-2 Marunouchi Chiyoda-ku, Tokyo 100-0005
Japan Self-Service Assoc.	Tel: 81(0)3-3255-4825 Fax: 81(0)3255-4826 <a href="http://www.jssa.or.jp/">http://www.jssa.or.jp/</a>	Sakurai bldg. 3-19-8, Uchikanda, Chiyoda-ku Tokyo, 101-0047

\*In all cases above in these appendices, dial the '0' when in Japan.

## Sector Reports and Further Information

The following homepages and reports can provide useful information to interested exporters.

- *Agricultural Trade Office's homepages*  
<http://www.usdajapan.org> (English)  
<http://myfoodbusiness.jp> (English/Japanese)  
<http://myfood.jp> (English/Japanese)
- *Food Processing Sector Report*  
A detailed look at Japan's food processing sector, identifying key trends and leading Japanese manufacturers.  
<http://www.fas.usda.gov/gainfiles/200703/146280587.pdf>
- *HRI Food Service Sector Report*  
A guide to Japan's nearly \$245 billion Food service market.  
<http://www.fas.usda.gov/gainfiles/200503/146118963.pdf>
- *Retail Sector Report*  
<http://www.fas.usda.gov/gainfiles/200611/146249538.pdf>
- *Food and Agricultural Import Regulations and Standards (FAIRS) Report*  
The FAIRS report is a comprehensive guide to Japan's food and beverage regulations, standards and requirements for importation.  
<http://www.fas.usda.gov/gainfiles/200808/146295490.pdf>
- *JETRO Handbook for Agricultural and Fishery Products Import Regulations.*  
<http://www.jetro.go.jp/en/market/regulations/pdf/agri2008-e.pdf>
- The Procedures for Importing Foods and Related Products into Japan Under the Food Sanitation law – link should be changed to  
<http://www.jetro.go.jp/en/reports/regulations/pdf/agri2008-e.pdf>
- *Red Meat Export Requirements for Japan*  
USDA Food Safety and Inspection Service (FSIS) summary of red meat export requirements for Japan.  
[http://www.fsis.usda.gov/Regulations\\_&Policies/Japan\\_Requirements/index.asp](http://www.fsis.usda.gov/Regulations_&Policies/Japan_Requirements/index.asp)
- *The National Organic Program - Export Arrangement with Japan*  
USDA Agricultural Marketing Service useful information on National Organic Program and Export arrangement with Japan. Product & Market Briefs  
<http://www.ams.usda.gov/nop/NOP/TradeIssues/Japan.html>
- *Japan Wine Market Annual Report*  
<http://www.fas.usda.gov/gainfiles/200803/146293864.pdf>  
Despite the strong competition among exporters and other alcoholic beverages like shochu, the outlook remains positive for U.S. wine. Key factors include Japan's improving economy, growing interest in New World wines, and continued deregulation of retail liquor licensing.
- *Pet Food Market Research on the Japanese Market*  
<http://www.fas.usda.gov/gainfiles/200304/145885127.pdf>
- *Japan External Trade Organization (JETRO) Reports*  
An excellent source for links to other government websites, food sector reports and English translations for the Government of Japan's documents.  
<http://www.jetro.go.jp/>  
Most relevant documents are at:

<http://www.jetro.go.jp/en/market/regulations/index.html>

- **Food and Agricultural Import Regulations and Standards**  
Japan, as one of the largest importers of US agricultural biotechnology products from the U.S., has approved 61 biotech events for food, 38 for feed and 50 for planting.  
<http://www.fas.usda.gov/gainfiles/200508/146130523.pdf>
- ***Revised Allergen Labeling Requirements***  
The allergen labeling required by Japan's Ministry of Health, Labor and Welfare requires foods containing any of the five ingredients known to cause significant allergic reactions; wheat, buckwheat, egg, milk and peanuts, to be labeled mandatory.  
<http://www.fas.usda.gov/gainfiles/200506/146130065.pdf>  
<http://www.fas.usda.gov/gainfiles/200802/146293678.pdf>
- **Update on Upcoming JAS Law Revision Affecting Certification Bodies**  
Japan's Ministry of Agriculture Fisheries and Forestry (MAFF) announced some details about the upcoming changes to the JAS Law, which will affect certification bodies for wood and organic products.  
<http://www.fas.usda.gov/gainfiles/200506/146130023.pdf>
- **Japan Releases Final Draft of Provisional Maximum Residue Limits (MRLs)**  
Summary of Japan's New Positive List System for Regulation of Agricultural Chemical Residues.  
<http://www.fas.usda.gov/gainfiles/200602/146176749.pdf>
- **Launch of "MyFood" Website (www.myfood.jp)**  
MyFood Japan, a web portal designed to showcase U.S. food quality, culture, and safety, made its debut May 16, 2005.  
<http://www.fas.usda.gov/gainfiles/200505/146119684.pdf>
- ***Update: Japan's Beef Traceability Law***  
Full implementation of Japan's traceability law for domestic beef began on December 1, 2004  
<http://www.fas.usda.gov/gainfiles/200412/146118379.pdf>

***Other FAS Japan Reports and other information***

Other Japan-specific reports are available on the USDA Foreign Agricultural Service Website.  
<http://www.fas.usda.gov/scripts/attacherep/default.asp>